

**Towards Transformation in Management Education:  
Telling the Managers' Tales**

**Elaine Louise Dunn**

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**Department of Management Learning and Leadership**

**Lancaster University Management School**

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## ABSTRACT

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This thesis focuses on the experiences of twelve senior managers who participated in postgraduate management education programmes embodying a transformative intent. It is informed by primary empirical research into the learners' perceptions of the emotions and changes in thinking attributed to their learning experiences and the emotions and changes in practice associated with transfer of learning into their workplace. The empirical research involved twelve research subjects over a two-year period, from the 2003-05 cohorts of the Exeter Masters in Leadership Studies and the Ashridge Masters in Organisational Consulting. .

The context is the contemporary debate about the alleged failings of management education which focuses on instrumental failure, ethical failure, and a disconnection between teaching and practice. Scholars have recommended and experimented with new forms of management education which challenge conventional assumptions, problematise existing knowledge, surface values and interests, embody critical reflection and facilitate experiential learning. However, research into critical adult education in the US has fuelled speculation that managers might suffer disturbing practical and emotional consequences as a result of questioning deeply held beliefs and behaving contrary to organisational norms. Educators have been urged to understand these consequences, but to date there has been little research in this area.

Previous research has focused primarily on the challenges faced by educators within the learning environment.

This thesis finds that critical postgraduate management education can be a site for transformative learning, that the outcomes for managers can be positive if educators provide skilled support, but that these outcomes are not necessarily gender neutral. It is argued that critical management learning discourses and practices need to balance critique with the teaching of research-informed theories for managing and organising work. This means theories informed by a new paradigm which embodies a *relational* understanding of human individuality, behaviour and development.

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# 1 INTRODUCTION

## 1.1 A point of departure

“I propose a radical solution to the problems facing management education, for management education is in a parlous state.” (Grey 2004, p178)

These are the words of Christopher Grey, now Professor of Organisational Behaviour at Warwick Business School. Back in 2004, Grey claimed that the problems associated with management education were many and varied. Problems such as the growing scepticism about the value and relevance of management education, reinforced by research suggesting that it has little discernible positive effect on career success or management practice. Problems such as the yawning gap between the unpredictability of the practice of managing contrasted with the teaching of management as an applied science involving reliable techniques predicated upon the search for control. Problems such as the normally unstated set of values inherent in management studies, such as those associated with efficiency, profitability and the market economy. In response Grey (2004) proposed that “critical management education” (CME) might provide one route for addressing some of these problems, defining CME as an educational practice which problematizes many aspects of management including claims to scientific and generalizable knowledge, the search for control, and the reliability of management techniques, and the existence of “value-neutral recipes for effective action”. CME shares some of the pedagogies associated with experiential learning, interpersonal relationships and self-awareness but goes beyond these to surface the values, power relationships and inequality implicit in management practice. Having presented his arguments Grey concluded with a sobering message to business schools:

“It cannot be assumed that we will forever be able to sell a product that so manifestly fails to do what it says it will do.” (Grey 2004, p184)

The concerns expressed by Grey (2004) form part of a long running debate in which academics have been voicing concerns, since the early 1980's, about the purpose, format and content of business school programmes. This has generated a plethora of publications each bemoaning the state of management education and proposing various remedies (Burgoyne and Reynolds, 1997; Dehler et al, 2001; Gosling, 1996; Gosling and Mintzberg, 2003, 2004a and 2004b; Grey, 2002 & 2004; Grey and French, 1996; Grey and Mitev, 1995; Leavitt, 1983; Locke, 1996; Mintzberg, 2004; Mintzberg and Gosling, 2002a & 2002b; Roberts, 1996; Thomas and Anthony, 1996; Watson, 2001b; Wheatley, 2001; Willmott, 1994, 1997, 2004). The debate incorporates a wide spectrum of views, raising fundamental questions such as whether management education should be *utilitarian* (i.e. *vocational* - helping managers to operate effectively) or *liberal* (helping people to understand management as a phenomenon), whether students should be practising managers, those aspiring to be managers, or simply those interested in management as a social phenomenon (Grey and French, 1996). Tensions between *vocational* and *liberal* education go back more than one hundred years in the UK, hence this debate can be understood as the managerial thread within a long standing unresolved issue regarding the role of education, especially university education, in society (Perriton, 2007).

Grey's (2004) article and the wider debate outlined above, were the crucible for the research questions addressed in this thesis. The research focuses on the experiences of a small group of experienced management professionals (organisational leaders, managers, management consultants) who participated in two innovative postgraduate

management education programmes in the UK, which appeared to eschew the much criticised mainstream approach. I had noticed that there were numerous proposals describing how the perceived problems in management education might be overcome. The common feature of these various proposals was the centrality of practice combined with a *critical perspective* to challenge conventional thinking, surface interests, values and assumptions, and thereby encourage and enable practising managers to adopt new approaches to their work. However, these proposals were often associated with concerns for the wellbeing of the participating managers yet there appeared to be very little empirical research focusing on these issues. Research within adult education in the US had linked critical adult education with negative emotional responses including self-doubt, alienation and fears of ‘cultural suicide’ (Brookfield 1994). Reynolds (1997), one of the UK’s leading scholars in the field of management learning, suggested that similar problems might affect managers on postgraduate programmes adopting a critical perspective and that management educators therefore needed to understand these consequences. Several years ago very few published studies had explored these experiences in any detail (Reynolds, 1999).

I therefore designed a study which would research the experiences of small group of management professionals who were participating in part-time postgraduate management education programmes which combined a focus on practice with a *critical perspective*. My research sites were the Exeter Masters in Leadership Studies (2003-05) and the Ashridge Masters in Organisational Consulting (2003-05) which I selected for reasons detailed in Chapter 3. The aim of my research was to gain a deeper understanding of managers’ perceptions of their experiences, focused around the following questions:

- How do people in leadership/management roles in a variety of work organisations perceive the consequences of participating in critical postgraduate management education? In particular:
  - ⇒ How do the learning experiences influence their practice?
  - ⇒ What emotional responses do participants experience?

## **1.2 A gap in the research**

In 2004 when I began my research there had been considerable speculation about the practical and emotional consequences for managers participating in critical adult education (Burgoyne and Reynolds, 1997; Dehler et al, 2001; Marsick, 1990; Reynolds, 1997, 1999; Willmott, 1994, 1997). Some of these concerns originated from Brookfield's (1994) empirical study among adult educators in the US and Mezirow's (1990, 2000) theorizing on the possible consequences of transformative learning. However, the empirical research focused mainly on the consequences for managers in the learning environment (e.g. Currie and Knights, 2003; Reynolds and Trehan, 2001; Watson, 2001b) in a field dominated by accounts of the dilemmas and challenges faced by the educators themselves (e.g. Elliott and Reynolds, 2002; Sinclair, 2000). Only one published study focused on the consequences for managers back in the workplace, reporting a small number of findings in respect of only two managers (Rigg and Trehan, 2004). Hence existing research was incomplete and inadequate for understanding the consequences of critical adult education for practising managers. Therefore my research was designed to make a new and unique contribution by focusing entirely on the practising managers, in particular their emotions during the learning process and the practical and emotional consequences for them back in the workplace. No previous British empirical research, which has

been published, has focused on the ways in which a group of managers experience the consequences of participating in postgraduate management education embodying a focus on practice with a *critical perspective*. Furthermore, neither of the selected programmes at Ashridge and Exeter had previously been researched via research questions of this nature. Since the commencement of this research in 2004, two new empirical studies have been published within the same sphere of interest. One of these features six case studies of graduates from the Ashridge Masters in Organisational Consulting (AMOC) and has been published by the Ashridge faculty themselves (Critchley *et al*, 2007). However, this focuses on the working lives of these graduates and how the AMOC curriculum informs their practice as opposed to how their learning experience *changed* their practice, which is my focus. The other study features a brief account of the consequences back at work for one manager participating in a Masters degree by action-learning at a UK university (Raelin and Coghlan, 2006). There have also been further publications focusing on the educators' point of view (Humphries and Dyer, 2005) and new studies reporting on the experiences of educators and managers but *only in the classroom* (Fenwick, 2005; Lawless, 2008; Sinclair, 2007; Trehan and Rigg, 2007).

Why did I believe that these issues and concerns were an important area for research?

Firstly because of the significant impact which management education has on managers and hence on wider society:

“The fact that management is socially important means that it is vital that it is exposed to critical interrogation. And since management education is such a significant arena for the reproduction of management, it follows that it is a primary site for such interrogation.” (Grey & French, 1996: p2)

Secondly, because of the negative impact which critical postgraduate management education *might* have on participating managers if Brookfield's (1994) findings and Reynolds' (1997) concerns were realised. Furthermore, if full disclosure is a "condition of authenticity in any educational encounter" (Brookfield (1994, p215) then from an ethical point of view both educators and participants need to be aware of the risks and consequences associated with any learning experience. Finally, if the problems said to be associated with business schools and management education are as serious as scholars claim, then pressure for change also needs to come from the consumers of business school products and services.

"The first step in this process is for corporate leaders to educate themselves about the current practices of the schools producing their future managers." (Bennis and O'Toole, 2005 p103)

Hence business people need to understand what is currently going on, and in particular how alternative forms of management education might impact on managers and might produce alternative forms of management practice.

### **1.3 The story behind the story**

Alongside other social science researchers (e.g. Watson, 1994) and feminist scholars such as Joyce Fletcher, I believe that all research is influenced by the standpoint of the researcher:

"...conventional wisdom holds that the story behind the story is crucial to understanding research because all research – feminist or otherwise – is value-laden and cannot escape being influenced by the history, life situation, and particular worldview of the researcher." (Fletcher, 1999 p7)

Therefore as an introduction to this thesis I have outlined my *story behind the story*.

This helps the reader to understand how this study was designed, how it evolved, what

questions I was trying to answer, and what drove me to pursue these issues. It also provides a more personalised account of the research, making explicit my personal history, my professional role, my worldview and my own learning and development, all of which have necessarily influenced my standpoint as a researcher. The story behind the story also outlines how certain perspectives and hence bodies of literature became increasingly important to me as the research progressed and the findings emerged. Hence the story provides both a contextual backdrop and an introduction to the literature review in Chapters 2 and 4.

The research questions at the heart of this study emerged from my own experiences as a professional manager. From 1981 to 1999 I worked in large Financial Services organisations, the latter half being spent in managerial roles culminating in seven years within the NatWest Group. Throughout this period I participated in many management development and education programmes including an MBA look-alike called ‘High Potential Options’ which was designed for NatWest by Ashridge and delivered by Ashridge, Cranfield, Manchester, and Warwick business schools. As mid-life approached I became increasingly sceptical about my lifestyle and began to question the value of working long hours for the benefit of shareholders. I had also become curious about various forms of managerial behaviour and their relative effectiveness in mobilizing collective effort within large organisations. This curiosity was increased by my study of leadership at Ashridge. I left the NatWest Group in 1999, moving to a managerial role in the Centre for Leadership Studies at the University of Exeter. Immediately I was struck by significant differences between managing in an academic context and a commercial environment. For example, as a corporate project manager within NatWest I was aware of the complex social reality

in which I operated and understood that I could increase my influence through the position (formal authority) of key people associated with my projects such as the Project Sponsor, typically a senior executive with overall control of the budget. NatWest had adopted a project based approach so project management became an institutional practice which gave me permission to involve people from multiple functions and divisions and the right to manage these people according to a set of procedures – the project management methodology. In an academic environment I quickly learned that none of these conventions applied. Influence appeared to be exercised almost exclusively by those in academic roles and I was reminded on numerous occasions that outcomes and deadlines were not to be determined by a manager! Furthermore the nature and purpose of University activities appeared to serve numerous competing interests (e.g. student satisfaction, financial stability, maximum time for research) as opposed to the clear focus on shareholder returns in the commercial sector. These experiences increased my curiosity about the nature of managerial work. I began to read extensively about leadership, management and management education as well as broader themes such as the philosophy of education and the aims of Universities.

In 2003 I joined the MPhil in Critical Management at the University of Lancaster. This course had been on my radar for some time and now became an ideal opportunity for me to unpack the questions which increasingly puzzled me. For example, why did there appear to be so many different ways of understanding the nature and purpose of management? Why was managing in an academic context so different to a commercial environment? Why did so many articles and books seek to separate leadership from management and privilege the former over the latter? Why were

there competing views on the nature and purpose of management education both within my own business school and more widely within the literature? Why did I have such a personal aversion to the writings of management gurus such as Tom Peters and Michael Porter? Why had I lost faith in rational, analytical approaches to management and educational programmes which embodied these?

As a critical management student I read extensively about the perceived failings of so-called mainstream management education. These perceived failings seemed to have three elements: instrumental failure (not doing what they claim), ethical failure (producing consequences of questionable value) and a perceived disconnection between teaching and management practice. My sympathy for these arguments grew out of my frustrations as a female manager whose lived experience bore little resemblance to the textbook descriptions of managerial work. After reading books such as *The Emergent Manager* (Watson and Harris, 1999) which highlighted the gap between the public discourse on management and the lived reality experienced by managers, I knew that I was not alone. I also knew that the debate about perceived failings in management education was gaining momentum. Pfeffer and Fong's (2002) article *The End of Business Schools? Less Success than Meets the Eye*, argued that management education in the US, in particular the MBA, continued to have minimal positive effect on management practice and individual career progression. This was followed by Henry Mintzberg's (2004) now famous book *Managers not MBAs*, one of the most high profile criticisms of the MBA ever published by a leading academic. Beyond the realms of academic publications, similar arguments also appeared in popular media. For example, in May 2004 the Economist published an article on management entitled *But can you teach it?* which argued that "business schools fail to

teach their students the right things” (Economist, 2004 p4). Thus the intersection of my experiences as a professional manager, as a business school student and subsequently as a business school employee, made me question what was being taught in business schools, how teaching was delivered and how learning was accomplished. I wondered how faculty decided on their course content and learning methodology and their suitability for the education of practising managers. I became deeply sympathetic towards the idea that so-called mainstream management education had a variety of failings.

In parallel I was noticing the arguments being made by various academics for *critical management education* as one solution to the perceived problems. In particular, I was intrigued by the idea that critical management education might change the way in which managers thought about and approached their work. However, as an experienced manager who was in the process of questioning my own assumptions and practices I was also concerned about the potential emotional and practical consequences for other managers who participated in programmes which significantly challenged their way of thinking and operating. By practical consequences I mean the way in which a manager operates as a result of learning experiences of a *critical* orientation which hold in tension the apparently contradictory objectives of the *utilitarian* and *liberal* approach, problematizing management knowledge, whilst still seeking to improve management practice (Mingers, 2000; Watson, 2001b). In the context of management I understood that the term ‘critical’ had diverse meanings including critical thinking (identifying and challenging assumptions, creating contextual awareness, imagining and exploring alternatives and developing reflective scepticism (Brookfield, 1987), critical social theory (e.g. ideas from the Frankfurt

School particularly Habermas 1972, 1979, 1984, 1993), critical management studies (e.g. Alvesson and Willmott, 1992, 1996) and Foucault's work (1980, 1982) on the relationship between power and knowledge. I also knew that leading management learning scholars in the UK had proposed a comprehensive *critical pedagogy* (Burgoyne and Reynolds, 1997; Reynolds, 1997, 1999; Vince, 1996) as a way forward and this was subsequently echoed in the US where it was argued that critical pedagogy could enable managers to cope with contemporary challenges:

“Grounding our fundamental argument in the notion of critical pedagogy (e.g. Barnett, 1997; Giroux, 1997), we posit that management education needs to become both transformational and emancipatory in order to adequately prepare students for the turbulent new century.” (Dehler *et al*, 2001 p494)

Working in collaboration with Jonathan Gosling, Professor of Leadership at the University of Exeter, I was very familiar with the critique of MBA programmes which challenged the teaching of functional disciplines, recommending instead an emphasis on action-learning to develop mindsets relevant to the interpersonal, leadership and communication skills associated with the practice of managing (Mintzberg, 2004; Mintzberg and Gosling, 2002a and 2002b).

My concern for the emotional consequences experienced by managers originated partly from earlier research studies (Brookfield, 1994) and also from scholars who promoted a critical perspective in management education whilst at the same time expressing concerns for the wellbeing of participating managers, given their implied role in challenging and changing current management regimes (e.g. Reynolds, 1997). There was also a personal perspective arising from conversations with my then line manager, Jonathan Gosling, who warned me that I might experience an existential

crisis as a result of participating in the Lancaster Critical Management programme!

As one of the original founders of the programme, Jonathan knew it well and understood the challenges which it might present to an experienced manager.

Having successfully completed the taught phase of the MPhil in Critical Management I began my research in late 2004. I designed a study which would seek to give voice to managers who participated in programmes which significantly challenged their way of thinking and operating. I decided that my research questions would be focused on the practical and emotional consequences for such a group of people. In retrospect I was probably trying to research people with whom I shared similar experiences and with whom I would have a degree of empathy! I was perhaps trying to make sense of my own puzzles and predicaments. In the latter stages of my research I began to understand this relationship, noticing in numerous publications that there was a connection between researchers and their research. This helped me to understand that I had probably designed my research as a personal sense-making device, a vehicle in which I could intertwine my intellectual interests with the puzzlement and curiosity associated with my place in the world as a female manager working in a Higher Education institution after many years in a corporate setting. My research is best described as an emergent project rather than a pre-planned activity, carefully designed and then implemented. Consistent with this emergent approach the literature reviews in Chapters 2 and 4 were developed in parallel with the research rather than being done 'up front' before embarking on the empirical study. Consequently the literature review became an expression of my emerging understanding of what I was endeavouring to research and a repository for my maturing perspectives on the various arguments and bodies of knowledge.

## **1.4 Outline of thesis**

In late 2004 when I began this project I selected the Ashridge MSc in Organisational Consulting (2003-05) and the Exeter MA in Leadership Studies (2003-05) as my research sites. I knew from my personal involvement with these programmes that they challenged existing assumptions and perceptions with a view to achieving some type of transformation within the learner. In part my original selection of these research sites had been an intuitive decision, albeit informed by personal experience and extensive reading. In order to locate these programmes within the UK management education arena, I have used Part 1 of the Literature Review, in Chapter 2, to review this terrain. This covers various forms of management education with the emphasis on those forms which embody a critical perspective while still seeking to improve management practice. This leads into a review of emotions associated with learning and the nature and consequences of transformative learning, concluding with a review of the empirical research studies published within my sphere of interest.

Chapter 3 reviews the Exeter and Ashridge programmes and compares them with the forms of education set out in Chapter 2. The aim is to provide the reader with an understanding of these programmes and also to make the case for them being appropriate sites for my research. Criticisms of mainstream management education provided a point of departure for my research hence Part II of the Literature Review in Chapter 4 begins with a review of this debate set within its historical context. This sets the scene for my research, and also provides a foundation for discussions in Chapter 8 focusing on the implications of this research for management education. The majority of Chapter 4 reviews the dominant and alternative frames of reference through which managerial practice is theorised and understood. This is organised

around *systems-control thinking* to represent the dominant view, and the process-*relational perspective* as a contemporary alternative (Watson, 2002), alongside various studies which have attempted to reveal the ‘real’ nature of managerial work (e.g. Mintzberg, 1973). What intrigued me about this area of the literature was that there seemed to be no absolute truth in terms of defining an *effective manager*, but simply competing discourses some of which appeared to have dominated at different points in time in different contexts. As time went by I realised that my reading of the literature was increasingly from a feminist perspective perhaps originating from my experiences as a female manager travelling in a male world (Marshall, 1984). Therefore the final section of Chapter 4 engages with what has been said about the overlap between management and masculinity, and the emerging contemporary preferences for a less heroic approach and the so called *female advantage*.

Chapter 5 describes how the empirical research was undertaken. Throughout this chapter care has been taken to demonstrate the coherence and appropriateness of the overall strategy and the choices made with regards to research design. This includes a thorough account of the fieldwork including the recruitment and briefing of research subjects, and how data was generated, recorded, analysed and interpreted. The overall methodology was inductive in order to enable ideas to emerge from the subjects’ own descriptions of their thoughts, emotions and experiences. A phenomenographic approach was adopted using semi-structured interviews as the primary research method to generate qualitative data. As the empirical research progressed, this chapter captures how the original research questions were scrutinised and subsequently refined. Chapter 6 presents the findings from the empirical research commencing with a portrait of the research subjects (individuals remain anonymous). This is

followed by findings in respect of their learning experiences and subsequent transfer of learning into the workplace. Consistent with a phenomenographic approach the findings include both cross-sectional themes and individual variations. Chapter 7 features an interpretation of the empirical research finds and thereby begins the process of answering the refined research questions. Chapter 8 develops several arguments for the implications of the research findings for the theory and practice of management and management education, making a number of new contributions. Finally, the conclusion in chapter 9 summarises the original research aims and compares these with the actual outcomes. It also includes reflections on personal learning, the limitations of this study and the opportunities for further research.

## **1.5 Naming and boundaries**

However, before proceeding, there is one key issue which requires attention and this is the terminology used throughout this thesis, particularly the terms *management* and *leadership* neither of which have a singular uncontested definition. Leadership and management have been subjected to a ‘compare and contrast’ style debate since the early 1970s and some scholars argue that the usefulness of this has possibly been exhausted (Burgoyne *et al.* 2004). However, this thesis focuses on management education yet the two selected research sites relate to leadership studies and organisational consulting respectively. In a doctoral thesis I believe that it is essential to provide some definitional clarity which the reader and I might share, hence the question of terminology must be addressed.

Firstly it helps to differentiate between management and other activities associated with running an organisation. Fayol’s (1916, 1949) influential treatise provides an informative starting point, defining six groups of activities:

- Technical activities (production, manufacture, adaptation)
- Commercial activities (buying, selling, exchange)
- Financial activities (search for and optimum use of capital)
- Security activities (protection of property and persons)
- Accounting activities (stocktaking, balance sheet, costs, statistics)
- Management activities (planning, organizing, command, co-ordination, control)

(Fayol, 1949 in Thomas 2003, p34)

Much of Fayol's list lies within a General Manager's role and such topics are included within MBA programmes. However, my focus is on what Fayol called *management activities* which today we might call leading, organising, managing or supervising. Hence my use of the word *management* is much narrower than popular usage. Within this thesis, management is not the technical, commercial, financial, security or accounting activities described by Fayol, but it is those activities which deal with defining the ends to be achieved and then organising and motivating groups of people to achieve these shared outcomes in the name of a particular organisation.

Secondly, notice how the language within discourses relating to organising and achieving corporate success in the 20<sup>th</sup> century and early 21<sup>st</sup> century, has progressed from *administration* to *management* to *leadership*, each one heralded as the solution to the emerging needs and unresolved problems within work organisations (Salaman, 2004). The naming of business schools' primary qualification, the Masters in Business *Administration*, signifies its early 20<sup>th</sup> century origins as with founding texts such as Mary Parker Follett's *Dynamic Administration* (Metcalf and Urwick, 1941) and Fayol's treatise *Administration, industrielle et generale* (Fayol, 1916).

Intriguingly the latter was later translated as *General and Industrial Management*

(Fayol, 1949) perhaps influenced by Taylor's (1911) *Scientific Management*, publicised in the UK in between the First and Second World Wars. Later Drucker (1954) published *The Practice of Management* which defined a central and heroic role for managers in achieving business success and economic growth. Thus *management* became the centre of attention featuring in influential publications such as *Managers and Their Jobs* (Stewart, 1967), *The Nature of Managerial Work* (Mintzberg, 1973), *The General Managers* (Kotter, 1982) and *The Making of Managers* (Handy, 1987) to name but a few from a vast canon.

In the early 1960s scholars began to associate leadership with the challenges faced by work organisations, borrowing ideas from discourses previously developed in relation to national politics, military operations and the church. This initially focused on leaders' characteristics (the so-called trait theories summarised by Stogdill, 1974), what leaders do (theories about leadership styles and behaviour originating primarily from McGregor, 1960; Blake and Mouton, 1964) and how leaders adapt or select their behavioural style according to their situation (Fiedler, 1967; Hersey and Blanchard, 1969; Adair, 1973). In the late 1970s Zaleznik's (1977) article in the Harvard Business Review initiated a new discourse which popularised the idea of differentiating between management and leadership. This separation was reinforced by Burns (1978) who constructed the notions of *transactional* leadership and *transformational* leadership. The former allegedly focused on clear goals and objectives, requiring the leader to plan, organize, obtain results and solve problems, with the leader's authority originating from hierarchical position and the relationship between the leader and other workers being purely instrumental, involving exchange of rewards, (pay, recognition, praise) in return for work undertaken. Conversely

*transformational* leadership was associated with engaging hearts and minds so that everyone experiences motivation, satisfaction, meaning and achievement. The leader supposedly creates a long-term vision and builds understanding and trust so that other workers are empowered to self-manage their activities in line with long-term goals. There is an emphasis on morals, change and releasing human potential. However, notice the overlap between transactional leadership and pre-existing descriptions of management. In contrast, compare transformational leadership with the dynamic aspects of management carefully reserved for leaders (as opposed to managers) by numerous scholars (Zaleznik, 1977; Bennis and Nanus, 1985; Bryman, 1986; Kotter, 1990). This discourse associated vision, change, creativity, intuition, strategy and ‘doing the right thing’ with leadership while control, rationality, operational goals, order, stability, consistency and ‘doing things right’ were associated with management. This facilitated the mapping of these roles onto different people, namely leaders and managers, with the former being blessed with charismatic inspirational qualities while the latter were depicted as boring bureaucrats.

Burns (1978) *transformational leadership* emerged following Kanter’s (1977) advocacy for organisational change based empowerment and it focused on meaning and satisfaction in a period when Handy (1984) later observed that people increasingly derived their sense of identity and success from their employed roles. Hence rather than saying that transactional leadership is *management* and transformational leadership is *leadership*, a more insightful observation has been to identify the former as a descriptive theory (a description of what is actually happening) and the latter as a normative theory (a description of what ought to be happening) (Marturano, 2004). This might go some way towards explaining increasing demands for leadership

development (e.g. Horne and Stedman Jones, 2001) and a growing emphasis on leadership, as opposed to management, as a key enabler of organisational success (Bolden, 2004). However, what is going on here? Recall that Fayol's (1949) management activities include *co-ordination* by which he meant 'binding together, unifying and harmonising all activity and efforts'. This has considerable overlap with "the art of mobilizing others to want to struggle for shared aspirations", one of numerous definitions of leadership (Kouzes and Posner, 2002). The key difference is the emotional response. Fayol's co-ordination perhaps only produces *compliance* whereas Kouzes and Posner's definition of leadership aims to produce *commitment* (Yukl, 2002). Thus the emphasis on leadership, in preference to management, as the solution to contemporary organisational challenges possibly reflects Western society's growing need for an emotional connection with their work rather than an instrumental relationship which enables the breadwinner to feed and clothe his (*her?*) family. Therefore, on closer inspection the separation between management and leadership becomes rhetorical rather than real. Mintzberg's early research (1973, 1990, 1994) found that leadership activities such as managing teams, motivating individuals and providing clarity of purpose infused all managerial work and he subsequently argued that people perceived to be managers also provide leadership and those perceived to be leaders also undertake management activities (Mintzberg, 2004). So, if a departmental manager hosts a meeting to listen to concerns about a forthcoming merger, then attendees might call this management. If the Managing Director of the same organisation hosts a similar meeting, then the attendees might call this leadership. Both hosts are engaging in the relatively mundane activity of listening, yet those around them attribute these activities with a particular significance depending upon the superior/subordinate relationship and the context in which these actions are

interpreted (Alvesson and Sveningsson, 2003). This is consistent with the idea that specific social phenomena called management and leadership do not exist. Instead there are social interactions which people describe as management or as leadership depending on who is doing them, who else is involved, what organising principles operate within the community or organisation, and the context (e.g. crisis situation or daily routine) in which they are done (Drath, 2001). Therefore management and leadership represent our attempts to name peoples' responses to the ongoing challenge of how to organise and motivate groups of people to achieve shared outcomes in the name of a particular organisation. They are not distinct phenomena.

Organisational consulting may appear to be quite different in terms of a consultant's employed status (often temporarily engaged) and the nature of the work undertaken which might include market research, strategy, cost reduction, leadership development and managing change. However, the Ashridge programme featured in this research, mainly attracted people involved in facilitating change in organisations, either in an employer or self-employed (consultant) capacity. Hence these practitioners were also engaged in management activities, meaning those which deal with defining the ends to be achieved and then organising and motivating groups of people to achieve these shared outcomes in the name of a particular organisation

## 2 LITERATURE REVIEW – PART I

Part I of the Literature Review covers a range of topics for a number of specific purposes. Firstly the reader will have noticed from ‘The story behind the story’ that my curiosity about management education has been expressed through questions relating to competing versions of the nature of an effective manager, questions about learning methods and the value of learning outcomes, attempts to differentiate management from administration and leadership from management, the role of gender and so on. Another way of expressing this is to say that management education programmes are sites for the intersection of a number of *discourses*. The first section of this chapter is devoted to a review of what is meant by the term *discourse* and its relationship to language, knowledge and power. Its purpose is to articulate my perspective thus providing a clear foundation for the thesis.

The second section establishes a language for talking about management education throughout this thesis by reviewing its various forms and functions. This is necessary because the term *management education* has so many meanings and phrases like *traditional* or *mainstream management education* are common but open to interpretation. The reason for reviewing these various forms and functions is to provide a basis for locating the selected research sites within the management education arena, and to provide a basis for demonstrating that they are appropriate sites for this research. A significant proportion of this section is therefore devoted to those forms of management education which embody a critical perspective while still seeking to improve management practice. Following Korpiaho *et al* (2007) these types of programmes are classified as *learning to change the game*. Hence this

section of the literature review focuses on broad forms of education, outlining their nature and intended purpose. Specific theories or approaches utilised within the learning process within the selected programmes, are outlined later in Chapter 3 as part of the descriptions of each research site.

The third section develops an understanding of why *learning to change the game* might be unsettling for the learner. This includes literature on emotions associated with experiential and transformative learning. The final section reviews the empirical research studies which have been published to date within my sphere of interest. As there is a lack of research in this area, the review also includes publications in which leading scholars speculate on the consequences for managers participating in critical postgraduate management education. This leads to the identification of gaps in knowledge and hence my research proposal.

## 2.1 A discursive perspective

Management education programmes are sites for the intersection of a number of discourses, where discourse is defined as:

“**DISCOURSE:** A set of concepts, terms and expressions which constitute a way of talking or writing about a particular aspect of life, thus framing the way people understand and act with respect to that area of existence.” (Watson, 2003 p46)

For example, through the discourse known as *management learning* promulgated in journals such as *Management Learning* and the *Academy of Management Learning & Education*, scholars seek to guide each other in relation to the various pedagogical approaches which appear most suited to achieving certain learning outcomes. If a business school academic is keen to design effective and stimulating learning events then he might engage in this discourse in order to understand other people’s thinking

on how to do this. Alternatively he might simply design these events based on his own preconceived ideas around how learning happens. Implicitly (perhaps on occasions explicitly) the discourse on the *psychology of adult development* is embedded within any management education event because the learning process reflects the educator's understanding of how adults grow psychologically, intellectually and morally. Also the discourse on the *sociology of management* is necessarily embedded within such learning events. This is the discourse through which scholars and practitioners debate the nature and purpose of management within its wider social context with associated arguments about what counts as desirable knowledge for managers to learn. So, when a business school academic determines the curriculum for a management education programme, he is deciding what managers should learn and whether or not he realises it, he is circulating his preferred discourse on the sociology of management i.e. on the nature and purpose of management.

### **2.1.1 Knowledge, power and discourse**

Through my reading of the literature on social theory and in particular the concept of power, I realised that my thinking was broadly aligned with post-structural theory, originating from Foucault's thinking which places an emphasis on the relationship between knowledge, power and discourse (Clegg, 1989; Jones, 2003; Watson, 2003). Michel Foucault, was a French social scientist and historian of ideas whose most influential work was published in the period from the early 1960's until his death in 1984. Foucault's theorising has certain themes, which are broadly consistent with a style known as 'post-structuralism' in which language is the central focus. In this context the term *language* does not mean different native tongues, such as English, Russian or Chinese but instead refers to specific ways of thinking and talking about aspects of the world, which Foucault called *discourses*.

Prior to Foucault (1977), thinking on power was dominated by the idea of sovereign power (A's ability to get B to do something) either through agency (e.g. the actions of a person) or structure (e.g. the obligations arising from people's positions in a hierarchy). From this perspective power appears to be either possessed or not possessed by individuals. However as an alternative to these polarised positions, Foucault argued power is not possessed by individuals but is embedded in the details of everyday life and circulates between all social actors. Foucault suggested that power had a *disciplinary* nature through which it achieved its effects. This concept of disciplinary power was developed as a result of Foucault's study of the asylum, the plague-stricken town and the prison in particular Bentham's Panopticon. In prisons the disciplinary nature of power is evidenced as the regulation of behaviour via the surveillance and assessment of individuals. However, Foucault argued that disciplinary power, including surveillance, has infiltrated many aspects of modern society where it resides in norms, routines, values, beliefs, rules and consent (Foucault, 1980). Furthermore, not only did Foucault regard disciplinary power as omnipresent, he also viewed it as *the dominant form* of power involved in the creation of what we perceive to be a modern civilised society in which we have freedom and choice (ibid). In this conception, since power is embedded in everyday relations and practices it is not the possession of an intentional agent neither is it located within social structures. Instead Foucault located the exercise of power within the use of languages by which he meant:

“...specific ways of thinking and talking about aspects of the world are forms of *knowledge* which work like languages and which we learn in the same way as we learn ordinary languages.....he (Foucault) calls such ‘languages’ –

systems of connected ideas which give us knowledge of the world – *discourses*”

(Jones, 2003 p145)

Emerging from this work, Foucault identified a fundamental relationship between power and knowledge, which he described as co-constituted through discourse i.e. through language which operates as both a creator and a consequence of power (Foucault, 1980). For example, an MBA graduate who has learned many theories and ideas about management might be appointed to manage a large group of people within a work organisation. We could say that the discourses (ways of thinking, knowing and talking) learned by the MBA graduate are regarded by some employers as knowledge which entitles the graduate to exercise power over numerous employees. Conversely, when respected experts, such as Professors of management, expound their ideas on a subject then many people might emulate their way of thinking and talking about the matter in hand. We could say that the Professors’ exercise of power (their perceived right to create and develop certain discourses) resulted in the creation of what others regard as new knowledge.

### **2.1.2 Language and reality - the construction of perceptions**

From a post-structural perspective, discourses have both descriptive and active capacities. The Foucauldian view is that we acquire discursive knowledge in the same way that we acquire language - it surrounds us, we absorb it and thereby it enables us to express ourselves and attach meaning to our experiences (Jones, 2003). This means that the only way we can think and talk about specific aspects of our world, such as managerial work, is by using a discourse of one kind or another from amongst those which we have encountered. This is not the same as knowing the truth (*ibid*). Thus, while we can experience social reality before we learn to speak, we cannot attach

meaning to it until we learn a set of terms, concepts and ideas (a discourse) through which to express ourselves.

Just as discourses enable human beings to express and share ideas, such discourses also exercise power over us because they are active in shaping the ways in which we understand and perceive ourselves. This is because we are obliged to use ideas from one or more discourses in order to express what we think and what we know. Our actions are based on our thoughts and knowledge and both of these are sourced from a variety of discourses. Thus from a post-structural perspective our actions (*what we do*) are shaped (*constituted*) by the ideas or concepts in our minds and the terminology which we employ to express ourselves. Foucault described this connection between thought, knowledge, language and action as *discursive practices* (Jones, 2003).

Furthermore, when we utilise our discursive resources, we not only describe our world but we also *create* our social reality since our language *acts* to define our understanding of it (Jones, 2003).

“...language is action as opposed to something which simply reports action or ‘mirrors’ the world. (Rorty, 1980 in Watson, 2001b p391)

From this perspective language is not regarded as a neutral medium and it does not provide an accurate representation of reality in the same way that a photograph might provide an accurate picture of a landscape. A painting created by an artist is not an accurate representation of reality, but a stylised construction of people or events as the artist would like us to see them and using materials and conventions available to the artist at that time. Similarly, when people communicate with each other they draw on the discourses available to them in order to construct particular understandings of people and events as they perceive them or as they would like us to see them. Their

language acts to “bring social worlds into being” (Wetherell *et al* 2001, p16). Thus language acts to construct the landscape – the objects, emotions, meanings and relations which constitute social reality including our understanding of ourselves, our identity, our role and our relationships with others.

“Through language, our sense of ourselves as distinct subjectivities is constituted.” (Clegg, 1989 p151).

The Foucauldian view is that discourses achieve this by creating representations or categories in relation to which people define themselves or are defined by others. For example, individuals might be categorised as normal or deviant, law-abiding or criminal, healthy or sick, virtuous or sinful, competent or incompetent. Having observed these practices within the sphere of mental health, Foucault concluded that such categorisations or representations are contextually and historically unstable (Foucault, 1980). For example, many people defined as mad and confined to asylums in the Victorian era would today be classified as mentally ill and in need of medication and sympathetic nursing care. From a Foucauldian point of view the modern world is therefore a *discourse-directed world* in which people police themselves or are policed by others. This surveillance causes individuals to monitor their behaviour in relation to discourses which are dominant in their culture in their time, in order to construct a sense of themselves in relation to other people and cultural norms. Hence there is a constant interplay between choice and constraint, between individual agency and the socially defined structure and cultural norms. Metaphorically speaking, the population is living in Bentham’s Panopticon where the gaze of prison guards is replaced by self-surveillance (Foucault, 1980).

### 2.1.3 The discourses on management and education

Examples of dominant discourses and self-surveillance are particularly evident in the discourses relating to managerial work. In post-industrial society in the UK, a series of influential people have promoted numerous definitions of the skills, behaviours and characteristics of an effective manager (e.g. Taylor, 1911; Handy, 1987) and numerous mechanisms such as competency frameworks have become normal vehicles for self-surveillance (Salaman, 2004). From post-structural perspective, none of the definitions of an *effective manager* constitute the truth. Instead they illuminate the competing discourses within this field, especially those which have become dominant in a particular time and place to the extent that they have been regarded as truth or reality. Hence a post-structural researcher does not seek the correct definition of an effective manager or what counts as good or bad management education. Instead attention is focused on how these different understandings are constructed through competing discourses each promoted by so called experts who “enforce normality and punish deviance” (Jones, 2003 p 136).

According to Foucault, all dominant discourses are eventually challenged by competing forms of knowledge (Foucault, 1980). The MBA is still the dominant form of postgraduate management education in the US and the UK hence it is possible to understand the growing articulation of concerns about this and the promotion of alternative forms of management education, as competing discourses within a broader debate on the merits and failings of university-based provision in management education. However, to what extent have these merits and failings been brought into being by the discourses currently circulating? Similarly, to what extent has our understanding of management and leadership been constituted through dominant

discourses, the knowledge which they privilege and the underlying power relations which they sustain?

This research is focused on the practical and emotional consequences for a group of experienced management practitioners who engage in learning which challenges their assumptions and perceptions. An implicit expectation is that the learning experiences generate changes from an *original* to a *new* way of thinking and acting. These original and new modes of practice are necessarily informed by various discourses on management, and in relation to this there are several assumptions which require illumination. The first assumption implicit within this research and also within the design of the selected programmes, is that the majority of the research subjects are likely to have entered their programme of study with their practice informed by the dominant discourse on management (organising, leading, managing). This may or may not have been the case, but Chapter 3 describes how the design for each of the selected programmes is predicated upon this assumption. The second assumption is that each of the selected programmes introduced the research subjects to alternative (non-dominant) discourses which could inform their practice. Both of the selected programmes claim to have transformative intent based upon challenges to conventional thinking, further details of which are provided in Chapter 3. The third assumption is that the majority of the research subjects are likely to have been working within organisations where the norms for managerial work were largely informed by the dominant discourse. Again, this may or may not have been the case, but concern for the consequences experienced by the research subjects reveals an assumption that the subjects might adopt new and possibly non-orthodox approaches to their work which might be perceived as counter-cultural by their work colleagues.

Hence an understanding of the dominant and the emerging discourses on management are important for this research as they reveal what constitutes *conventional thinking*, what form new modes of practice might take and what challenge the latter might present to the former. These competing discourses are reviewed later in Chapter 4 but first there is a review of the discourses which shape our understanding of management education.

## **2.2 Management education - forms and functions**

Business schools throughout the UK deliver a wide range of postgraduate management education programmes and a comprehensive review of these is neither feasible nor necessary for the purposes of this research. Instead the focus is on how the discourses relating to management education portray its various forms, the nature of the dominant and alternative forms and how writers use these constructs to argue for their relative merits and failings. A recent article by scholars from the Helsinki School of Economics (Korpiaho *et al*, 2007) identify seven different conceptions of management education which regularly appear in the published articles in three influential Anglo-American journals of management education, namely *The Academy of Management Learning & Education*, *The Journal of Management Education*, and *Management Learning*. The Helsinki scholars analysed these seven forms of management education according to *who* the students and teachers are, *how* the learning and teaching is done, *what* outcomes seek to be accomplished and *why* these outcomes are said to be justifiable or of value to various stakeholders (Korpiaho *et al*, 2007).

### 2.2.1 Mainstream forms – learning to play the game

The first two forms are identified as *traditional management education* and the *MBA program* and in critical articles these both tend to be referred to as either *traditional* or *mainstream* approaches (ibid). The *traditional management education* approach is characterised as one in which teachers are specialists in particular disciplines, the teaching methods are mainly lectures and case studies focused on specific disciplines such as organisational behaviour, accounting or marketing and the students are largely instrumentally oriented careerists in search of senior management positions (ibid). *The MBA* is described as similar to the traditional model except for its curriculum which is said to be broader to encompass general management skills, and its target audience which varies depending on whether the programme is full-time, part-time or executive (modular).

Other recent reviews which have attempted to uncover the *facts* relating to MBAs have argued that MBA programmes across Europe are not homogeneous and neither are the students who participate in them (Mazza *et al*, 2005). Students vary in terms of age, work experience, learning aims and many other factors (ibid). Programmes vary in terms of curriculum, teaching methods, learning philosophy and assessment practices (ibid). However, despite this diversity several scholars contributing to the discourse on management education claim that there is a dominant pedagogy, particularly in MBA teaching, which embodies a *disciplinary* approach involving the transmission of a body of knowledge *about* subjects associated with management (e.g. Currie and Knights, 2003; Mintzberg, 2004). Typically, it is argued, this includes compulsory modules in several disciplines including operations management, marketing, finance, accounting, information technology, organisation theory or

behaviour, human resource management, strategic management and the management of change (ibid). This disciplinary approach is sometimes complemented by a *staff development* approach (Grey *et al*, 1996; Currie and Knights, 2003) involving case studies, role-playing, student participation and group activities designed to develop personal skills and to reflect the social, emotional and interpersonal dimensions of managerial practice (ibid). In both the disciplinary and the staff development approach students are assessed by written assignments and formal exams. Critics claim that this core design around business functions is adhered to by the majority of full-time and many part-time MBA programmes (Mintzberg, 2004) and is created and maintained in part by accreditation bodies such as AMBA (Grey, 2002).

According to Korpiaho (2007) and her colleagues, the official goal of mainstream management education, as presented in the three selected journals, is to produce competent managers. Managers are required to *learn the existing game* and this is portrayed as a valuable outcome because it is believed that they will improve the organisations in which they work and hence generate economic benefit. Critics have suggested that whilst managerial competence is the official goal, the unofficial goal is to bestow legitimacy on those who possess certain qualifications (Grey and Mitev, 1995).

### **2.2.2 Revised forms – same game different approach**

The second two forms of management education identified by Korpiaho (2007) and her colleagues are *science-based* and *competency-based* education. These are said to share the goals of the *mainstream* approach but differ in terms of how the teaching and learning is to be accomplished. The *science-based* approach is mainly associated with US business schools and involves the teaching of robust evidence-based theories

grounded in scientific research (ibid). Critics argue that there is no positive correlation between management research and management practice thus questioning the relevance of the science-based approach (Ghoshal, 2005; Pfeffer and Fong, 2002). In contrast the *competency-based* approach is said to focus on skill development and is therefore delivered by trainers and people who research the development of skills (Korpiaho *et al*, 2007). In the UK the majority of this type of education currently takes place outside of business schools (Burgoyne *et al*, 2004).

### **2.2.3 Alternative forms – learning to change the game**

The remaining three forms of management education identified by Korpiaho (2007) and colleagues are *service learning*, *action-based education* and *critical management education*. These are said to share a common goal which is *learning to change the game* of management rather than simply teaching students how to play the game in its current form. Therefore they all emphasise the students' role in questioning and evaluating management knowledge and practices although the focus of this questioning is different in each type of education.

*Service learning* is a US based approach which requires students to engage in civic projects in the not-for-profit-sector, the aim being to enhance the students' moral awareness and thus ensure that they become responsible citizens with a high regard for democracy and human dignity (ibid). *Action-based education* is a new phrase coined by Korpiaho and colleagues to describe programmes which involve action learning groups and action research projects but which are not pure forms of either approach. Experienced managers bring their real-time problems and experience into the centre of the learning arena and work on these with the other managers via

discussion, research and reflection. The principles of action learning and action research are often involved.

“..students not only “learn by doing” but, first and foremost, by reflecting on their doings and experiences,” (Korpiaho *et al*, 2007 p42)

The goal is to educate managers so that they become *reflective practitioners* able to take action, improve their practices but also to recognise the issues associated with managerial work including those practices which might be harmful in a social or environmental sense. Potentially this creates a contradiction for the participants because they are encouraged to improve their practice whilst simultaneously questioning and challenging their assumptions, their source of authority, their impact on people, the wider social consequences and their part in producing these:

“It is the paradox of action-based management education that it aims to educate professional managers who will challenge the omnipotence of management.”

(Korpiaho *et al*, 2007, p50)

Similarly *critical management education* seeks to enable participating managers to reflect on and challenge managerial ideology and practices but with an increased expectation that the managers will subsequently take political action (*ibid*). The teaching methods involve critical reflection and thinking informed by critical theory with a particular focus on the relationship between power and knowledge in a managerial context. The goal is not to produce educated managers who will deliver economic efficiency, but critical beings “emancipated – as far as possible – from structural or cultural determination” (Korpiaho *et al*, 2007, p51) and who will therefore help to create a transformed and more just society. It is never clear whether this involves the students continuing to be employed as managers! If action-based education is paradoxical for its students, then critical management education sets up a

double paradox in that it requires students to challenge the authority of their own profession (as with action-based education) while at the same time placing the teaching faculty at the centre of a contradiction:

“...we (*the faculty*) are embedded in an educational system that both profits from and promotes the managerialist agenda we like to think we are combating.”

(Perriton and Reynolds, 2004, p73 in Korpiaho *et al*, 2007, p51)

## **2.3 Management education – learning to change the game**

This research is focused on forms of management education which embody a critical perspective while still seeking to improve managerial practice. Korpiaho *et al* (2007) classified these as *learning to change the game* a category which includes service learning, critical management education and action-based education. The following section reviews these forms in greater detail, excluding service learning which occurs mainly in the US and which is therefore outside the scope of this UK based research.

### **2.3.1 Critical management education**

#### ***2.3.1.1 Introduction and origins***

There is no single definition of what constitutes critical management education (Watson 2001b). Furthermore, there are differences between what is meant by the noun *Critical Management Education (CME)* and the various meanings of the adjective *critical* when used to describe management education (Perriton, 2001).

As a noun, CME is defined and promoted by a specific group of scholars (Willmott, 1994; Fox, 1994; Grey and Mitev, 1995; French and Grey, 1996) many of whom are associated with the academic project known as Critical Management Studies (CMS) originated by Alvesson and Willmott (1992). In contrast the adjective *critical* and

hence the term *critical pedagogy* is used by various scholars involved in management education (e.g. Burgoyne and Reynolds, 1997; Reynolds, 1997 and 1999; Vince, 1996) drawing on ideas originating from the field of radical adult education (Freire, 1970; Giroux, 1981) and group dynamics (Brookfield, 1987; Mezirow, 1990 and 2000). Consequently numerous approaches to management education can be labelled *critical* including those involving critical social theory originating from the Frankfurt School (Habermas, 1972, 1979, 1984, 1993), or the development of critical thinking (Mingers, 2000), or Marxist critique of managers' role in worker exploitation, or a Foucauldian focus on power and knowledge designed to disrupt taken-for-granted conceptions of managerial work, or feminist perspectives (e.g. Perriton 2000; Perriton and Reynolds, 2004).

In the UK the emergence of critical management education in the mid 1990's followed shifts in the economic landscape away from traditional production-led industries such as manufacturing and mining, towards the consumer-led service and retail sectors, aided by the widespread deployment of information technology. In the late 1970s, French philosophers, such as Lyotard and Foucault, began to question modernism's promise of progress via the application of science and reason, and other grand social theories such as Marxism, liberalism and Fascism. They rejected such universal truths and instead stressed the centrality of image and language in constructing a plural and fragmented reality. Thus postmodern social theory, typically attributed to Lyotard (1984), was born. In essence, scepticism and plurality replaced certainty and unity. These changes provide important contextual awareness for the practices and discourses which inhabit and shape management education generally and critical pedagogy specifically.

Critical Management Education (CME) is typically described as the educational arm of Critical Management Studies (CMS). In the 1980s, government sponsorship of management education and growing connections between business schools and corporate interests, prompted Anthony (1986) and Reed and Anthony (1992) to challenge the increasingly *vocational* and largely uncritical approach. There followed a series of influential publications by Willmott (1994), Fox (1994), Grey and Mitev (1995) and French and Grey (1996) which argued for business schools to adopt a *liberal* approach involving a critical pedagogy, thus giving birth to Critical Management Education (CME). Since its original conception, numerous voices have further developed the agenda for Critical Management Education (e.g. Grey, 2002, 2004, 2007; Grey, Knights and Willmott, 1996; Perriton, 2004, 2007; Perriton and Reynolds, 2004; Reynolds, 1998, 1999; Reynolds and Vince, 2004b; Willmott, 1997, 2004). In addition there have been several accounts of educators' efforts to operationalize CME within their teaching practice (including Currie and Knights, 2003; Dehler, 2009; Fenwick, 2005; Grandy and Gibbon, 2005; Perriton, 2000, 2001).

Tensions between *vocational* and *liberal* education have been debated in the UK for over one hundred years, hence CME can be understood as part of this long-standing issue regarding the role of universities in society.

“Both CMS and CME are contemporary expressions of the same concern that the role of management education is not just to make better managers but also to make a better society.” (Perriton, 2007 p68)

This politely glosses over those CMS scholars whose ambitions appear to be to eradicate managers altogether (Parker, 2002). In the US the history of business

schools and management education is quite different with a long-standing tradition of vocational programmes sustained by parental and employer demands (Perriton, 2007). Hence it has been difficult for US academics to engage with CME in their teaching or research with further constraints imposed by powerful journal editors concerned about the barely disguised anti-capitalist orientation of CMS (ibid). However, although Critical Management Education (CME) is often defined in relation to Critical Management Studies (CMS), its pedagogy is also informed by radical adult education (Freire, 1972; Giroux, 1981) which pre-dates CMS (Perriton and Reynolds, 2004). Hence Grey (2004) has attempted to distance CME from CMS:

“CME does require that one accept CMS’ core claim of the unavoidable presence of values. It does not require that we all agree with CMS on what those values are.” (Grey, 2004 p180)

Similarly, Reynolds (1997) carefully draws a distinction between the *critical perspective* of writers such as Willmott (1994) who is closely associated with CME and CMS and the more general concept of *critical thinking* in adult education. Likewise Watson (2001b) has taught from an anti-managerialist perspective without joining the CME fraternity and without denying his contractual responsibility to help managers improve the quality of their practices.

### **2.3.1.2 Critical pedagogy - CME**

So what does critical pedagogy in CME actually mean? One of the earliest contributions to CME discourse defined critical pedagogy as a perspective that:

“...challenges positivist knowledge within management and, in so doing, it opens up the debate about the social and moral implications of management practice” (Grey et al, 1996, p109)

According to Grey (2002) CME starts from the lived experience of the students (managers) and aims to enable them to make sense of these experiences using both traditional *and* critical resources. The learning process is a mixture of critical self-reflection as found in action learning and critical social-reflection involving critical theory. This requires programme content to be both traditional (e.g. accounting principles) and critical (e.g. Foucault on power and knowledge) and for the learning process to be action learning informed by critical theory. One of the central aims is to bring the messiness of management practice into play while working to instil critical questioning in the students' minds so that the dynamics of power and control in the workplace are revealed. Subsequently, CME has been described as an educational practice which recognizes the political, ethical and philosophical nature of management practice and which therefore problematizes many aspects of management including claims to scientific and generalizable knowledge, the search for control, the reliability of management techniques, and the existence of "value-neutral recipes for effective action" (Grey 2004, p182). Perriton and Reynolds (2004) have argued that CME has "an identifiable set of pedagogical beliefs" (ibid, p65) many of which are borrowed from radical and adult education. These include a focus on ends as well as means, a perspective that is social rather than individual, a foregrounding of power and ideology, a questioning of assumptions embedded in theory and practice, attending to moral as well as technical issues, and overall, an emancipatory aim towards a more just society.

### ***2.3.1.3 Critical pedagogy – more generally***

Outside of the tightly patrolled CME discourse (Perriton, 2001), *critical reflection* is located at the heart of a *critical pedagogy* in which both "content and methodology demonstrate a critical perspective" (Reynolds, 1997, p313). A *critical perspective* in

management education can mean several different things (Burgoyne and Reynolds, 1997). Typically it includes critical thinking but also critical (social) theory, particularly the work of Habermas (1972) of the Frankfurt School relating to *critical reflection* (Burgoyne and Reynolds, 1997). Following Kemmis (1985), critical reflection is described as a process which focuses on a four key areas (Burgoyne and Reynolds, 1997). Firstly it involves questioning many of the assumptions associated with management including “moral judgements as well as practical and technical choices” (Burgoyne and Reynolds, 1997 p107). Secondly it focuses on the social, political and historical nature of experience rather than treating experience as a purely individual thing. Thirdly, and most importantly, it pays attention to power relations and in particular the relationship between power and knowledge. And, finally it is concerned with emancipation via social action towards a more just society.

Based on Hindmarsh (1993) and Kemmis (1985), Reynolds (1997) emphasizes the importance of understanding the nature of *critical reflection* as distinct from other modes of reflection. For example, he describes how *instrumental reflection* is focused on means in order to find the best solution to a practical problem. This differs from *consensual reflection* which considers both means and ends but within the current organizational context, assumptions and values. However *critical reflection* engages with problems in a way which challenges existing context, assumptions and values thereby encouraging attention to be paid to the socially situated nature of experiences in contrast to the discourse of individualism which is more typical in educational settings. Critical reflection not only pays attention to the social, political, cultural and institutional context, it also challenges assumptions and seeks to reveal sectional interests and values with the dual aim of personal and social change. Thus Reynolds

describes the goals of critical reflection as “personal development” and the “betterment of society” (Reynolds 1997, p316). If managers are to be encouraged to apply critical reflection to their management practice then Reynolds (1997) urges management educators to do likewise in respect of their teaching. Thus, following Giroux (1981), Reynolds (1997) recommends a critical pedagogy where both the content and the educational methodology embody a critical (radical) perspective as depicted in Figure1.

**Figure 1 Alternative pedagogies based on Giroux**

<b>Traditional education</b>  Traditional content Traditional method	<b>Content-focused Radicals</b>  Radical content Traditional method
<b>Strategy-based Radicals</b>  Radical method Traditional content	<b>Critical Pedagogy</b>  Radical method Radical content

Based on Giroux (1981) from Reynolds (1997, p313)

In terms of content, critical pedagogy involves a critical treatment of management theory in order to stimulate questioning rather than forcing students to learn and accept ideas at face value. In terms of process, critical pedagogy involves non-hierarchical teaching methods (e.g. facilitation of dialogue, encouraging students to influence programme design), the application of critical perspectives to the learning process (e.g. what assumptions are we making about how people learn), and

reflexivity (i.e. an educator applying critical perspectives to their own role in the process) (Reynolds 1997).

Dehler (2001) concurs with Reynolds but argues that in addition to radical content and radical process, critical pedagogy must embody a fundamental change in the roles and responsibilities of faculty and students. This means that “the educator’s task is to create a space in which learning can occur” (ibid, p499), that students take on responsibility for their learning, and that teaching is viewed by faculty as part of research so that students are enabled to understand “the concept of learning as an unfolding process of inquiry to be approached in a genuinely critical way” (ibid, p500). In terms of programme content Dehler (2001) recommends students are introduced to a wide variety of subjects and a critical treatment of them all. This will involve questioning so called common sense, surfacing assumptions, noticing interests served, understanding power relationships, and building awareness of the moral, political and social nature of managerial knowledge and work. In terms of the learning process Dehler (2001) recommends de-centering the classroom (no-one is the expert), challenging and blurring disciplinary boundaries, and problematizing issues. The aim is to enable the students to shift from being *consumers* to *producers* of knowledge capable of theorizing their own experience within the context of a variety of other course materials. Critical scholars make it clear that critical reflection on experience is not the same as traditional humanistic approaches in which reflection is used to raise individual self-awareness (Grey *et al*, 1996). Instead the emphasis is on calling knowledge and experiences into question thus enabling the learners to connect their experiences with broader social issues such as insecurity, inequality, power, exploitation and the socially constructed nature of reality.

### **2.3.2 Action based education**

This section reviews the characteristics and aims of *action-based education*. In order to maintain a focus on postgraduate management education programmes delivered by business schools, this review deliberately excludes a wealth of literature on action learning and action research within non-accredited programmes and organisational settings. Action learning approaches cannot be regarded as unitary when viewed across several contexts such as Higher Education, small business support and management development (Pedler *et al.* 2005).

#### **2.3.2.1 Introduction and origins**

The origins of both action learning and action research lie in the work of John Dewey (1897) the American psychologist and educational reformer who founded the experiential education movement (Raelin, 2009). Action research was first developed by Kurt Lewin in the mid 1940s as a means of achieving transformative social change during and following World War II (Dickens and Watkins, 1999). Lewin proposed increasing collaboration between practitioners and social science theorists so that research into practical problems could be combined with theory building. In the UK the origins of Action Learning are typically credited to Revans (1980, 1982, 1983) who developed the approach in response to his frustrations with traditional business school programmes. Despite holding a professorship at the University of Manchester, Revans resigned his post when the new Manchester Business School was created in 1965, criticising the MBA long before it became fashionable to do so! Revans' (1980) Action Learning is one of at least four different types of action learning (Yorks and Marsick, 2000). The *Tacit School* of action learning focuses on solving problems within existing frames of reference. The *Scientific School*, following Revans (1980),

is similarly concerned with problem solving but emphasizes the importance of asking questions such that problem setting is as important as problem solving. The *Experiential School* is founded on Kolb's (1984) learning cycle and therefore embodies the dual aims of problem solving and personal development. Finally, the *Critical Reflection School* includes the learning goals of the three previous levels, but also an emphasis on reflection on the premises underpinning each individual's habits of mind and therefore an increased probability of transformation. During the 1980s and early 1990s various forms of action learning were regularly used by management developers and has allegedly been one of the most successful approaches (Burgoyne and Reynolds, 1997). During this period it was rarely used by academics delivering business school management education although research conducted in 2004 indicated that numerous academics introduced some action learning principles and practices into postgraduate and post-experience programmes during the preceding ten years (Pedler *et al*, 2005).

### ***2.3.2.2 Critical Action Learning – in theory***

Reynolds (1997) identifies Willmott's (1994) proposal for Critical Action Learning as an educational design consistent with an ideal critical pedagogy. Occupying the overlap between critical management education and action-based education, Critical Action Learning was introduced within the first edition of *Management Learning* (Willmott, 1994) as an educational approach which combined Action Learning (Revans 1982) with critical content:

“...combine and synthesize the experiential quality of Action Learning with the cognitive insights into management derived by critical management academics.”

(Willmott, 1994 p123)

Willmott (1994, 1997, 2004) only refers to Revans (1982) so an informed assumption is that he contrasts Critical Action Learning with Revans scientific Action Learning. Action Learning involves managers working together in learning sets to share experiences, problems, uncertainties and concerns so that through facilitated discussion they can evaluate, diagnose, redefine and solve their problems (Willmott 2004). Rather than teaching models, concepts and theories to them, the aim is to develop the individuals so that they are more able to solve problems. Thus Action Learning challenges “the passive abstracted approach to learning” (Willmott 1994, p126) for which universities have been criticised. Personal-development is central and knowledge is only regarded as valuable if practitioners are capable of selecting and applying it appropriately in their specific situations (Willmott, 1997).

Critical Action Learning has many similarities to Action Learning including engagement with immediate practical problems and a critical stance with regards to the status quo in management practice Willmott (1994, 1997, 2004). However, Critical Action Learning differs from Action Learning both in terms of its means and ends. Action Learning has been criticized for being too centered on the individual as heroic change agent (Pedler, 1997). Critical Action Learning seeks to redress this through the application of critical theory which enables individuals to appreciate that they are embedded within a broader social and institutional context which might enable or constrain their individual problem solving capabilities (Willmott 1997, 2004). Action Learning has also been criticized for focusing too much on tasks and projects to the exclusion of learning, such that existing organisational agendas are served rather than questioned (Pedler, 1997). Once again Critical Action Learning claims to address this weakness through the application of critical perspectives on

management which enables managers to be attentive to power relations within their organization and within the learning set (Willmott, 1997, 2004). By illuminating the role of power in shaping their understanding of situations and problems Willmott, (2004 p132) claims they no longer see their organization as something “to be acted upon” but as a “psycho-political field of action” of which they are a part. Exactly how this helps managers to improve the quality of their practices remains unclear but perhaps this is not Willmott’s aim!

### ***2.3.2.3 Action-based pedagogy – in practice***

Within the context of management education, two recent articles, namely Pedler, Burgoyne and Brook (2005) plus Simpson and Bourner (2007), provide the basis for near universal agreement on the nature and characteristics of action learning (Raelin, 2009). Pedler *et al*’s (2005) research reported a considerable degree of commonality in the *practice* of action learning within a Higher Education (HE) context. In response to the question “What is action learning?” more than 75% of respondents agreed on the following key features:

1. sets of about six people
2. action on real tasks or problems at work
3. learning is from reflection on actions taken
4. tasks/problems are individual rather than collective
5. tasks/problems are chosen independently by individuals
6. questioning as the main way to help participants proceed with their tasks/problems
7. part of an existing programme
8. facilitators are used.

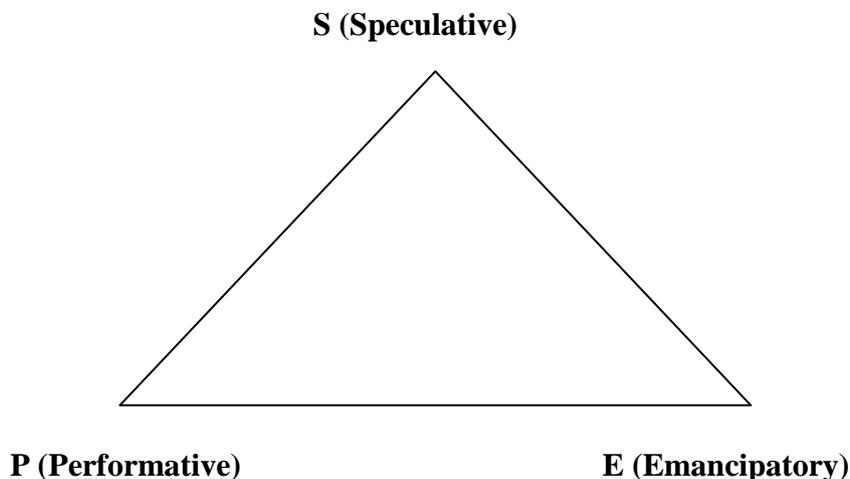
Two other key features of this sample are worth noting:

9. taught elements are included (70%)
10. linked to a qualification (73%)”

(Pedler *et al.*, 2005, p54)

According to Pedler *et al.* (2005), items 2, 3 and 6 are consistent with the classical principles of action learning while items 7, 8, 9 and 10 are specific to HE and raise questions about the role of expert knowledge in action learning within HE as this is more typically subordinated to participants' knowledge and questioning within Revans' action learning. They observe that Critical Action Learning seeks to overcome this by employing expert knowledge in the form of critical theory in order to challenge conventional wisdom. Whilst Pedler *et al.* (2005) report a degree of consensus with regards to the *methods* involved in action learning, they identify considerable variety with regards to the *ethos* implicit within its various enactments. By *ethos* they mean the purposes for which action learning is used, the values of its practitioners and the forms of knowledge employed. Following Lyotard (1984) and Burgoyne (1994) these variations are described using a triangular framework of meta-narratives depicted diagrammatically in Figure 2:

**Figure 2 Lyotard's triangle**



- ⇒ **Speculative (S)**: knowledge for its own sake; concerned with developing a disciplinary body of knowledge and passing it from the wise to the ignorant.
- ⇒ **Emancipatory (E)**: knowledge to overcome oppression and attain highest human potential; concerned with society as well as the individual.
- ⇒ **Performative (P)**: knowledge that helps action in the world; concerned with improving quality of practice, becomes training if aims not questioned.

(Based on Pedler *et al*, 2005 and Burgoyne, 1994)

Action learning is most typically positioned between P and E reflecting its distrust of scholarly knowledge, its concern with improving practice and the overall humanistic intent regarding a better society (Pedler *et al*, 2005). Critical Action Learning resides somewhere between S and E from an educator's perspective, requiring participating management practitioners to generate any knowledge which might improve the quality of their practice (P). Pedler *et al*. (2005) do not classify action learning into the four different schools proposed by Yorks and Marsick (2000), namely *tacit*, *scientific*, *experiential* and *critical reflection*. However, given the earlier discussion of these it is possible to map them onto Lyotard's triangle as follows:

- ⇒ *tacit* school located at P
- ⇒ *scientific* school between P and E
- ⇒ *experiential* school between P and E but closer to E
- ⇒ *critical reflection* school between E and S.

Action research and action learning have a number of common features including a shared learning process involving questioning, planning, acting, observing, reflecting (Simpson and Bourner, 2007). However, beyond this there are several important differences. Firstly, action learning is focused on personal development whereas action research is focused on social change. Secondly action learning may generate new knowledge but this is not one of its success criteria, whereas for action research it is essential:

“...a defining characteristic of action research that it seeks to add to the stock of knowledge in the public domain.” (Simpson and Bourner, 2007 p179)

Thirdly, actions arising from action learning can be entirely personal whereas the aim of action research is to generate change within a wider social system.

## **2.4 Learning to change the game**

The literature on action-based education and critical management education shows that participants can be enabled to *learn to change the game* if the learning process involves critical reflection on existing assumptions, social, political and cultural context, power, knowledge, and the ends served by their practice. This *transformative intent* draws upon earlier traditions in radical adult education (Freire, 1970; Giroux, 1981). Recognising these earlier traditions, this section reviews literature on *transformative learning*, developing insights into the nature of this type of learning and why it can be unsettling for the learner. My research questions include a focus on the research subjects' emotional responses to their learning experiences hence it is appropriate to review what has been said about the emotional aspects of experiential management education, particularly action-based learning. In this context, Vince's (1996) work on the emotions associated with experiential learning provides a helpful introduction to the subsequent review of transformative learning.

### 2.4.1 Experiential learning

Early schooling typically encourages learners to see other people, such as teachers and parents, as expert sources of knowledge and learning, reminiscent of Friere's (1970) banking model of education (Vince, 1996). Hence adult learners can experience anxiety and uncertainty when "confronted with responsibility" for their own learning and when engaged in learning processes which involve questioning their existing knowledge and beliefs (ibid, p122). This anxiety can limit adult learning:

"The need to feel competent, consistent, in control and comfortable for ourselves and with others sets a boundary around our capacity to learn and change."

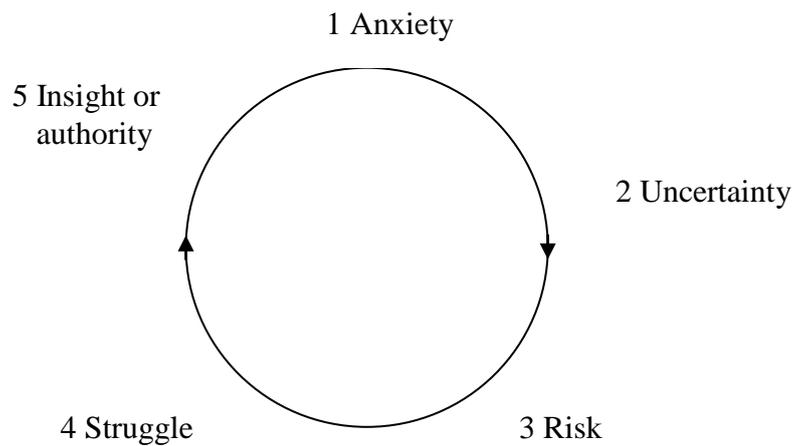
(Vince, 1996 p113)

Furthermore, individual anxiety can be compounded by the social reality within which learning takes place, such that individuals feel constrained by the powerful influence of structures, expectations, codes of behaviour and so on within their organization or wider societal group (Freire, 1970). For example, men who have spent many years in a military environment may feel unable to discuss their emotions with fellow participants in a learning group. Learners may elect to accept or to reject such constraints but either route may generate frustration or further anxiety. However, if learners are enabled to recognize the socially constructed nature of their 'controlling' social reality, then they can engage with these *political* dimensions of their learning. Hence action-based education has rational, emotional and political aspects even though the latter two are rarely mentioned in the literature, thus mirroring the wider body of literature on managerial work (Vince, 1996).

Consistent with this sanitized portrayal, Revans' original action learning cycle features the rational elements including "five successive stages: observation,

provisional hypothesis, trial, audit and review” (Vince, 1996 p120). In recognition of the other dimensions Vince (1996) adds two cycles of emotions, one which promotes learning and one which discourages learning. The *promotion of learning cycle* (Figure 3) proceeds from anxiety to uncertainty, through risk and struggle finally reaching empowerment in the form of either insight or increased authority.

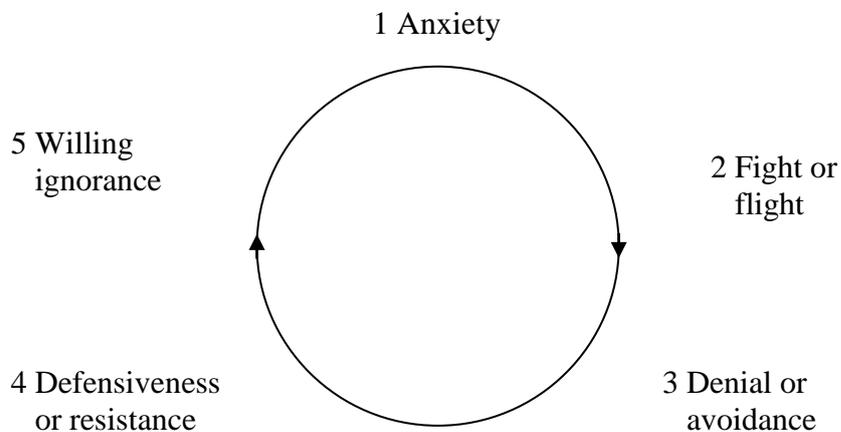
**Figure 3 Cycle of emotions promoting learning**



Vince (1996)

The *cycle which discourages learning* (Figure 4) begins with anxiety but proceeds to fight or flight, denial or avoidance, defensiveness or resistance and finally willing ignorance.

**Figure 4 Cycle of emotions discouraging learning**



Vince (1996)

## 2.4.2 Transformative learning

The leading proponent of transformative learning in the field of adult education is Jack Mezirow, emeritus professor of adult and continuing education at Teachers College, Columbia University in the United States. Mezirow (1978) introduced the concept of transformative learning as a result of his research into women entering or returning to higher education later in life. He observed how many of the women developed a critical awareness of their personal and cultural context which enabled them to challenge roles and constraints which they had previously taken for granted. Mezirow's concept of transformative learning is influenced by Paulo Freire's (1970) idea of *conscientization*. Freire pioneered adult literacy programmes among poor people in South America as a means of raising their consciousness. Mezirow's thinking is also influenced by Thomas Kuhn's (1962) notion of a *paradigm* originally defined in relation to the pursuit of scientific knowledge but subsequently said to have meaning in a sociological sense this being:

“...the entire constellation of beliefs, values, techniques, and so on shared by the members of a given community.” (Kuhn, 1970 p175)

Drawing on the work of a psychiatrist (Gould, 1978) Mezirow builds on Kuhn's idea of a paradigm to develop the concept of a *meaning perspective* this being a frame of reference which includes values, beliefs, goal orientations and assumptions. A *meaning perspective* comprises sociolinguistic codes (social norms, ideologies etc), psychological codes (personality traits, learned prohibitions etc) and epistemic codes (learning styles etc). According to Mezirow (1990, 2000) this frame of reference influences the way individuals perceive, think, feel and act, their habits of mind and hence behaviours which develop in relation to these. A meaning perspective can be acquired through cultural assimilation (e.g. what it means to be French), or it may be

intentionally learned (e.g. a Marxist perspective) or it might be unintentionally learned as in the case of socio-cultural stereotypes:

“Others are stereotypes we have unintentionally learned regarding what it means to be a woman, a parent, a manager, a patriot, a member of a particular racial group, or an older person.” (Mezirow, 1990 p3)

Although Mezirow includes *manager* among his examples of unintentionally learned socio-cultural stereotypes, he argues that what it means to be a manager can also be intentionally learned through experiences including education programmes.

Transformative learning is described by Mezirow as a process of perspective transformation by which we:

“...transform our taken-for-granted frames of reference (meaning perspectives, habits of mind, mind-sets) to make them more inclusive, discriminating, open, emotionally capable of change, and reflective so that they may generate beliefs and opinions that will prove more true or justified to guide action.” (Mezirow, 2000, p7)

This perspective transformation is said to arise from *critical reflection* on one's values and assumptions to assess their source, validity and consequences (Mezirow, 1990).

The process of perspective transformation may occur in a variety of situations perhaps individually (e.g. in psychotherapy), or in a group (e.g. in learning sets) or collectively (e.g. in civil rights movements) or through those forms of adult education in which adults are guided to reappraise their meaning perspectives (Mezirow, 1990). In this latter context transformative learning is interactive and public rather than a private process because it involves:

“...exposure to alternative perspectives and participation in critical discourse with others to verify one's new reality.” (Mezirow, 1990 p364)

In this process the adult educator does not espouse a particular view of the world or a particular way of seeing, thinking, feeling and acting. Instead the educator aims to precipitate change in each learner by drawing them into critical self reflection about their own ideas and assumptions. Thus the educator aims to be an empathetic provocateur helping learners to face up to contradictions between their beliefs and their actions, their espoused theories and their practice, and to appreciate differences between their own perspective and those held by other people (Mezirow 1990).

Individuals who experience transformative learning are likely to find it threatening and intensely emotional because it challenges deeply held beliefs (Mezirow, 2000). For this reason it is essential that the learners are emotionally mature, with well developed abilities to handle relationships, handle their own emotions and with strong social competencies in areas such as empathy, self-control and trustworthiness. Alongside these individual dimensions transformative learning also has a social dimension because when transformative learning takes place the learner not only thinks differently, they also act differently. As a result other people are likely to be affected:

“...life is not seen from a new perspective, it is lived from that perspective.”

(Novak quoted in Mezirow, 2000 p24)

Graduates of transformative learning may challenge those around them perhaps questioning norms of behaviour (such as workplace discussions being conducted in an adversarial manner) or traditional roles (such as responsibility for housework) or assumptions about the nature of their work (such as the assumption that managers are politically neutral experts, deploying technical skills and designing efficient systems so that an organisation can achieve its goals). However, it is possible that transformed

learners may avoid acting on their new found insights for fear that it might position them as social outcasts:

“Knowing that challenging the dominant ideology risks bringing isolation and punishment down on our heads is depressing and frightening. ....Who has the courage, or foolhardiness, to commit cultural suicide in the cause of social transformation? (Brookfield, 2000 p145)

Brookfield is commenting on the predicament faced by adult educators whom he researched but it is possible to imagine that people in managerial roles who experience transformative learning could face similar dilemmas on returning to their workplace. This potential predicament is the birthplace of my research questions.

Mezirow's concept of transformative learning is complex. This review has so far focused on *what it is* but even greater clarity can be achieved by considering *what it is not*. For example, Mezirow (1990) describes how transformative learning involves *critical reflection* on one's values and assumptions to assess their source, validity and consequences. One of Mezirow's adult education colleagues, Brookfield (2000) agrees that transformative learning cannot happen without critical reflection, but Brookfield is equally concerned to stress that critical reflection does not inevitably lead to transformative learning:

“...critical reflection is a necessary but not sufficient condition of transformative learning.” (Brookfield, 2000 p125)

Brookfield (2000) also emphasises the need for an accurate definition of the term *critical reflection* and the avoidance of its indiscriminate use for activities which constitute other forms of reflection. Brookfield believes that for reflection to be

described as *critical reflection*, its purpose must be to uncover power relationships and hegemonic assumptions, and that critical theory must be involved:

“I believe that the ideas of critical theory – particularly that of ideology critique – must be central to critical reflection and, by implication, to transformation.”

(Brookfield 2000, p128)

Thus Brookfield argues that the word *critical* remains closely associated with its origins in the Frankfurt School of Critical Social Theory. Similarly, Brookfield (2000) supports Mezirow's (1990, 2000) continuing efforts for the word *transformative* to be used with care in order to retain its distinctive and accurate meaning. Thus transformative learning does not occur just because someone thinks differently about a problem or because they have a deeper understanding.

“Merely understanding better the nuances and multiple realities of an idea or practice does not, in my view, deserve to be called transformative.” (Brookfield, 2000 p143)

Instead Brookfield and Mezirow agree that the term transformative learning should be reserved for those situations where there a fundamental shift:

“...it is clear that he (*Mezirow*) has been consistent in asserting that a transformation is a transformation in perspective, in a frame of reference, in a personal paradigm, and a habit of mind together with its resulting points of view.” (Brookfield, 2000 p139)

In order to contextualise transformative learning a brief comparison with other forms of learning is illuminating.

### **2.4.3 Learning domains & theories**

Mezirow's concept of transformative learning has its theoretical roots in the work of sociologist Jurgen Habermas who was responsible for developing the Critical Social

Theory originated by the Frankfurt School of German philosophers. Working from a sociological perspective, Habermas defined two major domains of learning these being *instrumental learning* (learning how to do something) and *communicative learning* (learning what others mean when they communicate with you) (Habermas, 1984, in Mezirow, 2000).

Instrumental learning involves acquiring skills and knowledge in order to know *how to do something* in order to improve task-oriented performance (Mezirow, 1990).

Instrumental learning is rooted in the principles of the natural sciences and therefore involves the application of reason and science to try to control human affairs.

“Instrumental learning involves the process of learning to control and manipulate the environment or other people.” (Mezirow, 1990 p8)

This means that the problem solving processes at the heart of instrumental learning involve hypothetical-deductive logic (test hypothesis, control variables, apply methods correctly, analyse consequences) also known as *reflection on experience*. This type of learning is typically associated with an expectation that the learning will lead to empirically measurable changes. So when managers participate in instrumental learning, there is an assumption that this will lead to changes evidenced in terms of productivity, performance or behaviour. A typical example of instrumental learning might be learning how to minimize wastage on a production line process.

Instrumental learning typically preserves and perpetuates ways of thinking and of seeing the world, and focuses on the acquisition of specific skills in order to be able to perform. Hence instrumental learning has become the main type of learning in the workplace due to the contractual relationship between individuals and their employing organization (Marsick, 1990). People are employed to *do* things hence employers

expect employees to learn *how* to do things better in order to increase productivity or profit. Communicative learning does not involve learning how to do something. Instead it is focused on *understanding the meaning* and *determining the validity* of what others communicate with you (Mezirow 1990). The aim of communicative learning is to learn to think autonomously which Mezirow describes as:

“...the ability of the learner to negotiate his or her own purposes, values, feelings and meanings rather than simply act on those of others.” (Mezirow, 2000 p10)

Understanding the meaning of something involves using one's meaning perspective to interpret experiences such as an unfamiliar event, concept, image, word or spoken communication (Mezirow 1990). It also involves trying to establish the *validity* of what is being communicated. Habermas (1984) also suggested three additional learning domains these being *emancipation*, *normative learning* (learning to behave in accordance with certain values) and *impressionistic learning* (learning to impress others) are also outlined. Mezirow (1990) redefines *emancipation* as transformative learning which can occur within instrumental and communicative learning events. *Normative learning* and *impressionistic learning* receive little further attention from Mezirow which is disappointing given their potential involvement in management education!

Mezirow's concept of transformative learning and Freire's notion of conscientization, discussed earlier, are both politicised forms of *humanistic* learning theory, meaning that they are value based theories about what educators believe *ought* to happen to empower people (Atherton, 2005). They are politicised because they embody an underlying assumption about the need for social change. They are also culturally specific because they assume a belief in human choice and social justice within liberal

democratic societies where rationality, self-awareness and empathy are valued (Mezirow, 2000). Their focus is on the individual realizing and developing their full potential. However, there is a risk that the emancipated individual will experience tensions within their social setting because they still need to operate within social institutions where not everyone has had a learning opportunity of this type.

In addition to humanistic theories of learning, other learning theories are classified as *behaviourist* (theories about how to develop skills), or *cognitive* (theories about how people understand and learn) (Atherton, 2005). The *cognitive* learning theories include a diverse collection of subject areas including *Gestalt* theories (about how the brain imposes patterns on the perceived world), *capacity to learn*, *learning styles*, and *developmental psychology* (how understanding changes as people mature) (ibid). As my research is not focused on the psychology of how people learn or how they develop skills, I have not reviewed the literature in these areas.

## **2.5 Research studies**

The purpose of this section of the literature review is to examine empirical research which has been conducted to date within my sphere of interest this being, the consequences experienced by managers participating in postgraduate management education programmes which are explicitly associated with *learning to change the game*. From this I identify gaps and hence opportunities for further research, specifically my research proposal for this thesis.

Following Korpiaho *et al.* (2007) I have adopted the terminology *learning to change the game* to describe programmes within my sphere of interest. However, it is difficult to identify programmes which fall into this category hence the focus is on

published empirical research in respect of programmes which authors *explicitly* associate with a critical pedagogy, CME, action research or action learning. This thesis focuses on the practical consequences for managers back at work and their emotional responses both during and after the learning experience hence this review is centred on published empirical research featuring managers' perspectives. It includes other studies which satisfy the programme category outlined above but which have researched different perspectives (e.g. the educator's) or other constituencies (e.g. doctoral students) but these are not reviewed in detail. However, they are mentioned in order to highlight the paucity of research into the consequences for practising managers, particularly back in the workplace.

### **2.5.1 Introduction**

Firstly I want to mention and thereby set aside, those studies which have reported on the consequences of utilising a critical pedagogy or an action-based approach but in areas which fall outside of my sphere of interest. This includes different categories of programmes and participants such as those involving undergraduates (Grey et al, 1996; Mingers, 2000), non-accredited management development programmes (Vince, 2008), full-time pre-experience postgraduates in Columbia (Gutierrez, 2002), a doctoral programme for academics in Canada (Grandy and Gibbon, 2005) and research into the use of CME among management developers (Perriton, 2001).

Secondly there are several articles which feature critical pedagogy or action-based approaches within my area of interest (i.e. managers undertaking postgraduate management education) but which only debate the possibilities and potential pitfalls for educators and managers at a theoretical level (Burgoyne and Reynolds, 1997; Dehler *et al*, 2001; Marsick, 1990; Reynolds 1997, 1999; Willmott, 1994, 1997).

Where these publications focus on the potential consequences for practising managers,

then they are reviewed in the section below entitled “Consequences for managers – conjecture”. Some of these concerns originate from Brookfield’s (1994) empirical study among adult educators in the US and Mezirow’s (1990, 2000) theorizing on the possible consequences of transformative learning, hence conjectures from these are also included.

Finally we narrow down the field to published empirical research in respect of programmes and participants matching my sphere of interest. Publications within this arena fall into three groups. Firstly, there are those which act as a guide or warning to other educators and which *only* report on the experience from *the educator’s point of view* (Cavanaugh, 2000; Elliott and Reynolds, 2002; Humphries and Dyer, 2005; Roberts, 1996; Sinclair, 2000; Thompson and McGivern, 2000). Secondly there are those which report on the practical and emotional consequences for the educator and for the participating managers but *only in the classroom* (Antonacopoulou, 1999; Currie and Knights, 2003; Fenwick, 2005; Hagen et al, 2003; Lawless, 2008; Nord and Jermier, 1992; Reynolds and Trehan, 2001; Sinclair, 2007; Trehan and Rigg, 2007; Watson, 2001b). Interestingly a large proportion of these studies also major on the educator’s perspective suggesting a greater concern for their own emotions and practical challenges rather than those experienced by managers. Some of them speculate about the consequences for managers back at work (e.g. Fenwick, 2005) hence I have included these speculations alongside their empirical findings. Finally there would appear to be only two published studies to date which report on the practical and emotional consequences for the participating managers *back at work* (Raelin and Coghlan, 2006; Rigg and Trehan, 2004).

The research studies identified within this introduction are evidence of a variety of interesting attempts to deliver forms of management education designed to enable *learning to change the game*. However, they highlight the lack of research into the workplace implications for *practicing managers* who participate in programmes of this type. My research is designed to generate new insights into this massively under-researched area. In the following sections I review publications which speculate on the consequences for managers, followed by a review of empirical studies into consequences for them in the classroom and finally the consequences back at work.

### **2.5.2 Consequences for managers - conjecture**

Mezirow (1990, 2000) has presented transformative learning in a favourable light on the basis that it develops frames of reference which are a better guide to action. A number of writers in the management education arena have expressed similar optimism in relation to the transformation which may occur for managers participating in critical or action-based programmes. For example, Watson (2001b) suggested that managers will reject managerialism and be generally more relaxed, happier and better at their jobs. In the US Dehler *et al.* (2001) envisaged that managers would progress from simplistic thinking to complicated understanding and well as learning to think more independently. Grey *et al* (1996) hoped that managers would learn to appreciate management as a social, moral and political activity and thereby enact their roles in a more authentic, more democratic, less oppressive and less exploitative manner. With regards to wider social consequences, some scholars have ambitions for management to become “a collective means of emancipation” (Willmott, 1997, p175). Others suggest that critical theory in the management classroom might even save the world!

“We believe such a critique and associated pedagogical praxis is required to encourage a generation of leaders who will work to transform the economic and

organizational assumptions that now underpin a society that does not provide a livelihood for all and threatens the very earth that sustains us.” (Humphries and Dyer, 2005, p184)

However, the potential benefits are balanced by potential risks. Transformative learning can be psychologically threatening as it involves changing some of the underlying assumptions and beliefs which have underpinned an individual’s thoughts, actions and self-perception to date (Mezirow 2000). Furthermore, transformative learning has practical, emotional, cognitive and social consequences (Brookfield 1994, 2000; Marsick, 1990; Mezirow 2000) hence students often need emotional support throughout the learning process. Learners who experience transformative learning will have to deal with the social consequences of this when they return to their organisational roles (Marsick 1990). Here they will have to come to terms with the interrelationship between their new personal meaning perspectives and “the body of socially constructed meanings that operate in the workplace” (Marsick, 1990 p24). They may find it difficult to accept practices or priorities within the organization which they previously regarded as unproblematic. Some may be able to approach this positively and hence become a catalyst for change while others may become demoralized, frightened and excluded from certain social groups if the possibility of changing the dominant ideology seems remote (Brookfield, 2000).

Even when such learning experiences have not resulted in transformative learning, managers will have been introduced to new points of view, ideas and contextual understandings which challenge the values, beliefs, means and ends associated with their practice. Managers who approach their role in a different way might run the risk of being isolated from their peers (Burgoyne and Reynolds, 1997). Furthermore, their

enthusiasm for change could be undermined by resistant or disinterested colleagues (Reynolds, 1999). Some might try to carry on as normal but with the risk of becoming disillusioned because of how they are required to behave or perhaps because of the purposes they must serve (Burgoyne and Reynolds, 1997). Others might suffer from guilt and/or cynicism although Willmott (1994) took the view that these feelings may be reduced if the learners' critical insights are fused with practical concerns via action learning.

One account which triggered concerns about the consequences for managers is Brookfield's (1994) influential research into adult education. Since its publication Brookfield's article has suggested a yawning gap between the inspirational rhetoric associated with adult critical reflection and the challenging personal consequences which might ensue. Brookfield's (1994) research was undertaken among a group of 311 adult educators, mostly female, who were encouraged to practice critical reflection over an 11 year period from 1981 to 1992 whilst working as educators in a variety of contexts including universities, the Church, and the US army. Brookfield's (1994) findings indicated a number of positive outcomes such as empowerment, emancipation or transformative breakthrough. Many spoke about the importance of peer support groups to sustain them throughout their learning and work experience. However, these positive experiences were balanced by several negative consequences which Brookfield describes as *impostership* (contrast between ideal self image as professional and the daily sense of struggling and not knowing), *cultural suicide* (exclusion from cultures which have hitherto defined and sustained them), a *disturbing loss of innocence* (everything ambiguous and uncertain) and *roadrunning*

which he describes as “fluctuating flirtation with new modes of thought and being” (Brookfield, 1994 p203). As a result many endured damaging personal consequences:

“Many adult educators complained that being critically reflective had only served to make them disliked by their colleagues, had harmed their careers, had lost them fledgling friends and professionally useful acquaintances, had threatened their livelihoods, and had turned them into institutional pariahs.” (Brookfield, 1994 p209)

If the phrase *adult educators* were changed to *practicing managers* I wonder whether the sentiments would be the same. Reynolds (1997) mused on this same question:

“These consequences must apply equally to managers on postgraduate programmes which are designed from a similar perspective. Arguably, management educators should understand and address these consequences if they are to work from a more critical perspective.” (Reynolds, 1997, p325)

However, since 1997 only a handful of empirical studies have been published, and as outlined earlier, most of these focus on the managers’ experiences within the learning environment rather than back in their workplace.

“Educators have also been aware of the possibility of adverse psychological or social consequences for anyone who chooses to engage in critical reflection – although there seem to be few studies which have sought to explore experiences of this in any detail.” (Reynolds, 1999 p176)

These few studies are reviewed, in chronological order, in the next section.

### **2.5.3 Consequences for managers – empirical studies to date**

#### ***2.5.3.1 In the classroom***

Walter Nord and John Jermier (1992) employed a critical curriculum within part-time Masters programmes in management as well as executive and full-time MBA. They found that only a small number of managers were completely unwilling to engage with critical social science (CSS). Of those who did engage, the most enthusiastic were those experiencing some form of disenchantment or frustration with their current role or organisation, many of whom held “counter-ideological beliefs” (ibid p210). Female managers and others who wished to challenge “white male domination” were also particularly receptive. Among the engaged managers the learning outcomes included an understanding of how language serves interests, gaining insight into sources of bias in the so-called value-neutral natural science methods, understanding capitalism and hence understanding the conflicting pressures on their managerial roles. However, they suggested that CSS would not necessarily be rejected by managers who were *not* suffering disenchantment, frustration or discrimination, speculating that these managers might appropriate the subject matter for their own interests such as increasing control and domination of workers.

Mike Reynolds and Kiran Trehan (2001) focused on managers’ behaviour within the classroom in reflecting on their experiences of using student *differences* as a source of learning within postgraduate management education. These differences included race, gender, sexuality, values and beliefs. The programmes were part-time postgraduate Diplomas and Masters for experienced managers, some delivered at the University of Central England and involving diverse student groups. The programmes employed a

critical pedagogy including learning groups in which students reflected on their work experiences and the learning process. Based on the students own reflective papers and discussions within these learning groups, Reynolds and Trehan (2001) found that some students favoured the un-structured participative learning environment while others found it alienating. Some were comfortable expressing their feelings while others were not. Tensions emerged between task focused learning and being required to reflect on emotions and group dynamics with some students rejecting the “touchy, feely process stuff” (ibid, p363). Power relations, often between men, dominated behaviour within some learning groups while others wrestled with a feeling of being coerced into self-disclosure. Whilst revealing nothing about the consequences for managers back at work, the study illustrates the difficulties associated with creating a learning environment where there can be “equality of dialogue through mutual respect and tolerance” (ibid, p367)

Teaching on a part-time MBA programme for practicing managers, Tony Watson (2001b) adopted a critical management approach which he described as *functional*, meaning that it was designed to improve the quality of managers’ practices, but *anti-managerialist* in that it rejected the notion of management as a “morally and politically neutral technical activity” (ibid p386). Watson’s *anti-managerialist* stance sought to surface issues of class, power and career interest, avoid privileging managers’ views over others, and avoid the idea that some knowledge is only useful to managers. The teaching approach involved discussions which combined managers’ stories, research stories and academic concepts and theories to develop the ‘story behind the story’ which Watson (2001b) describes as a *negotiated narrative*. The learning experience enabled the students to recognise and ridicule examples within

their own organisations of managers who hid behind pretentious language which created an impression of expertise. This included phrases such as *driving through changes* or *put in place* or *climbing the learning curve*. The origins and effect of such language was debated. Some agreed with the critique while others defended the managerial language. For Watson (2001) the story behind the story was that managers utilise such language because it acts as a fairy tale in which they are the hero, thus enabling them to cope. There was no consensus, only personal emerging stories.

Graham Currie and David Knights (2003) reflected on the use of a critical pedagogy within an MBA programme attended by students in their early 30s. They interviewed fifteen students all of whom had science or engineering backgrounds, eight of whom were from the UK, twelve were studying full-time. The findings are based upon a three-way categorisation of different approaches to teaching these being a *disciplinary* approach, characterized by the acquisition of a body of knowledge *about* management, a *staff development* approach which seeks to address the interpersonal and emotional aspects of managerial activity, and a *critical* approach which encourages students to reflect critically on their experiences and on management knowledge. The MBA programme was delivered mainly via a disciplinary approach but the students said they favoured a staff development approach because of the career advantages they believed it would bring. On modules where a critical pedagogy was adopted, some students were willing to engage, but many were not prepared for the level of participation expected of them. Some felt they had no legitimate right to question conventional wisdom, and some (especially non-UK students) experienced classroom dialogue as a complete culture shock having been used to a disciplinary approach in their education to date. The students from South East Asia said that they

wanted to be socialized into Western thinking in order to gain employment and therefore found it difficult to question management knowledge.

Roulla Hagen, Susan Miller and Marie Johnson (2003) introduced a critical management elective into the second year of a part-time MBA at Durham University, involving experienced managers from the private and public sector. The module focused on the origins and nature of management knowledge. Once again the majority of the findings focus on the challenges faced by the three female educators including emotional disruption and challenges to their sense of identity and authority. Feedback from the students at the end of the module indicated mixed reactions to the course. Some enjoyed it while others found it disappointing and accused the lecturers of peddling agendas. Curiously, despite reacting negatively to the discomforting discussions on gender during the course, most reported that they enjoyed this topic. This pattern was mirrored in other students' comments suggesting that the informal learning environment and critical subject matter was appreciated by many despite giving the academics an uncomfortable ride during the course.

Tara Fenwick (2005) employed critical perspectives in her teaching on one unit of a postgraduate programmes for mid-career managers in western Canada. Drawing on her own classroom experiences, Fenwick noted that her students were particularly receptive to critical analyses of oppressive discourses and practices within their own organization, and were excited by the new insights offered by critical scholarship. They were also receptive to a critical analysis of management guru texts for which they had a concealed suspicion and disgust. However, despite engaging with these analyses both in the classroom and in their written assignments, the students appeared

unable to sustain changes in their practice. Fenwick concluded that the dominant ideology within their workplaces and embedded within all of the other course units effectively marginalised critical perspectives thus positioning them as alternative, weird or other. Furthermore, Fenwick (2005) speculated about three potential ethical dilemmas associated with critical analyses. Firstly, is it ethical for an emancipatory educator to disturb other people's values and beliefs? Secondly, is it ethical to invite students to de-construct their positions, identities, traditions and practices without offering constructive and hopeful alternatives? Thirdly, is it ethical to engage learners in an orientation which they may subsequently find impossible to enact with any sense of authenticity within their work organisations?

Amanda Sinclair (2007) adopted a critical approach to teaching leadership on an MBA and EMBA programme at Melbourne Business School, in Australia. Her findings are self-reported and once again focus on the educator's experiences. Sinclair's critical pedagogy included experiential group sessions and associated reflection, changes to room and layout (from tiered lecture to chairs in two horseshoes) and a critical readings pack. On the MBA the critical leadership module was an elective. The students were a mix a part-time and full-time, with an average age of 29. Most of the students responded positively to the module and several of them experienced watershed moments for which they expressed their gratitude. However, on the EMBA the story was quite different. The business school had secured corporate support for the programme which involved full-time senior managers from a number of clients. The critical leadership module was compulsory and notably different to the functionally organised, content-rich modules which constituted the majority of the programme. The students responded negatively to Sinclair's informal *content-light*

approach, refusing invitations to participate in reflective activities, sometimes staying silent or storming out of the room. They questioned Sinclair's credentials and eventually complained to the Dean resulting in another lecturer taking over the module. Following approaches from some students, Sinclair continued to work with seven of the original forty students, one of whom said "you have encouraged us to take off our suits of steel" (ibid, p467).

Kiran Trehan and Clare Rigg (2007) adopted a critical pedagogy on a post-experience part-time Masters for Managers programme at the University of Central England. The programme adopted a critical action learning approach requiring students to work in action learning sets for two thirds of the time. These involved facilitated discussions to work through live organisational issues as well as reflecting on the learning process and the learning set dynamics. The students were encouraged to think critically, create theory from practice and become aware of their own theories-in-use (Argyris and Schon 1974). Drawing on the students' reflective papers Trehan and Rigg (2007) reported how some students struggled with having responsibility for their own learning instead of relying on the faculty as knowledge bearers. One student reported experiencing risk and uncertainty but claimed to learn most in such situations. Others spoke about real personal change or an awakening jolt regarding their role and life. Sadly the authors provide no insights into the consequences for these managers back in their workplace.

Aileen Lawless (2008) researched her teaching on an MA in Human Resource Development at Liverpool John Moores University. The programme design involved action learning and critical reflection. Using tape recordings of the action learning

sets the study focused a discourse analysis of the language used by the students. This revealed that while they were able to utilise critical perspectives within their conversation, they were constrained from acting on these within their workplace due to the ‘dominant repertoire’ within their organisation. Lawless concluded:

“From a community of practice perspective people construct identities as they become part of a community. Therefore, the ability to read the local context and to act in ways that are valued by other members of the community is central to identifying the competent member.” (Lawless, 2008 p127)

This suggests that managers are unlikely to attempt or sustain changes in their workplace practice if they have any doubts about being perceived as competent. A practitioner who is already highly regarded, or past caring, might be much bolder!

### **2.5.3.2 *Back at work***

The programme researched by Rigg and Trehan (2004) involved critical action learning and is the one featured in their book chapter outlined earlier (Trehan and Rigg, 2007). Their research was based on themselves as participant observers supported by the students’ reflective papers. In a refreshing departure from many of the other research studies, the authors provide insights into the impact which the programme had on the managers back at work. Using extracts from reflective papers, the consequences for two students are shared. One of the students described how she had developed insights into her own power base, influence and inequalities within her organisation. As a result she had given herself permission to be a “real live fallible person” (ibid, p155), was less concerned about being a better manager and was happier within herself. Another female student recognised that she had previously emphasised “the masculine facets” (p156) of her personality and that this had served her well to date. However she harboured doubts about staff morale and ethical issues.

As a result of her learning experience she looked for an alternative non-masculine role model and chose her mother who taught her six children to value sharing, honesty, listening and considering other's feelings. This shift enabled the manager to feel more confident and to trust her instincts. A third manager reflected on his learning experience but focused on his emotions in response to the formation of what appeared to be racially segregated learning sets. He recognised the need to reflect on his reaction to these situations and thereby understand his beliefs and values. Rigg and Trehan (2004) provide one further example based on a transcript from a racially diverse learning set which reveals them struggling with this diversity. This reiterates some of the difficulties associated with creating a democratic learning environment, as outlined earlier (Reynolds and Trehan, 2001). Based on their own observations Rigg and Trehan (2004) claim that the course was a catalyst for perspective transformation in some students:

“...participants talk of the course triggering far-reaching changes and rethinking about how they interact at work or enact their management roles.” (Rigg and Trehan, 2004 p161)

However, Rigg and Trehan (2004) provide no empirical data on how these changes are perceived by the manager's colleagues back at work. Instead they speculate that there could be adverse consequences, pressure to conform to cultural norms and hence “no basis for social change” (ibid, p162).

Joseph Raelin and David Coghlan (2006) provide an extensive account of how management education programmes involving action learning or action research can utilise the students own experience as a source of learning and actionable knowledge. Within this account they feature the consequences for one manager who participated

in a Masters degree by action learning at the University of Huddersfield. The consequences included greater immersion in her work-related issues (rather than seeing other people as the problem), re-framing her thinking and language in relation to her staff and re-framing how her staff regarded training so that it could become a multi-location community building activity rather than a waste of time. Sadly there are no other empirical examples to support their proposals.

These empirical studies are examples of innovative educational practices through which managers are invited to *learn to change the game*. However, little attention has been paid to the consequences for managers back in the workplace hence my research is designed to generate new insights into this massively under-researched area.

#### **2.5.4 A research proposal**

In order to address the gaps identified through this review, satisfy my curiosity and develop my skills as a researcher, I developed a proposal to research the experiences of small group of experienced management professionals who were participating in part-time postgraduate management education programmes which combined a focus on practice with a *critical perspective*. For reasons documented in Chapter 3, two research sites were selected, namely the Exeter Masters in Leadership Studies (2003-05) and the Ashridge Masters in Organisational Consulting (2003-05). The aim of my research was to gain a deeper understanding of managers' perceptions of their experiences, focused on the following questions:

- How do people in leadership/management roles in a variety of work organisations perceive the consequences of participating in critical postgraduate management education? In particular:

⇒ How do the learning experiences influence their practice?

⇒ What emotional responses do participants experience?

Two aspects of their emotional responses were relevant to this research. Firstly their emotional reactions during their learning experiences and secondly their emotional responses as they transfer learning into the workplace.

The review of previous research studies suggested that managers involved in *learning to change the game* might experience positive consequences consistent with some of Brookfield's (1994) findings and the "inspirational rhetoric that surrounds the discourse on critical reflection" (Brookfield, 1994, p205). Such rhetoric applauds challenges to scientific conceptions of management and encourages managers to develop different ways of thinking about and enacting their role. In contrast, Fenwick (2005), among others articulated risks which managers might face including possibly an existential challenge flowing from a contradiction between their transformed conception of themselves as a manager and the expectations placed upon them by social norms and the dominant management ideology within their organisation.

Therefore, recognising the potential for wide variations in outcomes for each of the participating managers, my aim was to research the participants' own understandings of the consequences for them. I chose to do this by means of open-ended questions during semi-structured interviews, details of which are set out in Chapter 5 as part of a wider discussion about both method and methodology. As highlighted in this review, the majority of research studies to date have focused on the consequences for the educator. Therefore my research was designed to make a new and unique contribution by focusing entirely on the practising managers, in particular on the practical and emotional consequences for them back in the workplace as well as their emotional

responses to the learning experiences. No previous British empirical research, which has been published, has focused on the ways in which a group of managers experience the practical and emotional consequences of participating in postgraduate management education which combines a focus on practice with a *critical perspective*. Furthermore, neither of the selected programmes at Ashridge and Exeter had previously been researched via research questions of this nature.

### 3 THE RESEARCH SETTING

This chapter describes the selected research sites and discusses the extent to which they were appropriate for pursuing my research questions. To set these programmes in context, the chapter begins with a brief summary of the UK postgraduate management education market around 2004 when my research commenced, and then focuses on those programmes which were candidates for my research.

#### 3.1 Choices available and choices made

*Science-based education* and *service learning* do not figure prominently within UK business schools (Korpiaho *et al.*, 2007) and the *competency based* approach is largely confined to activities taking place outside of Higher Education (Burgoyne *et al.*, 2004). Therefore this summary includes programmes broadly aligned with the descriptors *traditional management education*, *MBA programs*, *action-based education* and *critical management education*. The research sites were necessarily chosen from programmes in the latter two categories recognising that these categorisations are approximate rather than absolute.

The descriptor *traditional management education* as defined by Korpiaho *et al.* (2007) includes numerous one-year full-time pre-experience postgraduate programmes in management available in the UK plus sector-specific postgraduate certificates and diplomas (e.g. PG Diploma in Hotel Management). *MBA programmes*, especially part-time formats are designed for practising managers and full-time programmes typically attract experienced people seeking to enhance their career prospects.

Statistics published by the Association of MBA's in 2006 and 2008 (Figure 5) confirm

the number of students involved in MBA programmes in the UK in 2002 and 2007 respectively.

**Figure 5 UK MBA student numbers 2002 and 2007**

UK MBA	2002		2007	
	Intake	Graduation	Intake	Graduation
Full time	5,781	4,931	4,192	3,430
Part-time**	4,463	3,861	3,627	2,168
Distance/Blended	3,214	2,258	5,604	2,572
<b>Total</b>	<b>13,458</b>	<b>11,050</b>	<b>13,423</b>	<b>8,170</b>

Source: AMBA (2006) Statistics on UK Business Schools and MBA programmes; AMBA (2008) Intake & Graduation Survey 07-08

\*\*Note that figures for part-time programmes include modular, in-company and consortium variations (AMBA, 2006).

Based on data from the Higher Education Statistics Agency the number of people joining *non-MBA* part-time postgraduate management education programmes in 2005/06 was less than 400 (HESA, 2008). This is a modest number when compared with the numbers attending full-time and part-time MBA programmes during the same decade (2002 and 2007) as detailed in Figure 5. Hence in 2004, the MBA was the dominant or mainstream form of postgraduate management education in the UK.

It is very difficult to identify part-time post-experience postgraduate programmes which fall neatly within the definitions for *action-based education* and *critical management education*. In 2004 the programmes in Figure 6 were identified as sitting broadly within one or more of these two domains. Information about each programme was obtained via business school websites or other sources as indicated. The data on student numbers for 2005/06 was added later in the research cycle (HESA, 2008).

**Figure 6 Candidate research sites**

<b>Title</b>	<b>Description</b>	<b>Students 2005/06 (HESA, 2008)</b>
Ashridge MSc in Organizational Consulting	Involving action learning, theoretical rigour and reflection on experience designed to develop the professional capability of the participants	20 (Personal data)
Bath MSc in Responsibility and Business Practice	Action research based and seeks to enable managers to “...integrate successful business practice with a concern for social, environmental and ethical issues.”	71 (Closed 2008)
Bristol MSc in Management Learning and Change	Residential modules designed to develop reflective practice and augmented by participation in action learning sets. (Originally: MSc Management Development and Organisational Change)	45
Exeter MA in Leadership Studies	Aspires to create a ‘reflexive theatre of learning’ combining ‘the posing of intelligent questions supported by academic study, with critical reflection on and changes in personal practice’ (Exeter Invitation to Study, 2003).	34
Huddersfield MA in Management by Action Learning	Managers work in action learning sets to tackle live issues and learn from the consequences of their actions. (Researched by Raelin and Coghlan, 2006)	2
Lancaster MA in Management Learning and Leadership	A mix of residential workshops, action learning and networked learning designed to develop both understanding and practice of management and leadership learning and development.	30

<b>Title</b>	<b>Description</b>	<b>Students</b> <b>2005/06</b> (HESA, 2008)
Lancaster MPhil in Critical Management	Involves seminars, tutorials and action learning and a curriculum which is ‘critical of management’ involving critical theory in general and critical management studies in particular (Lancaster brochure for MPhil/PhD in Critical Management, 2003).	Closed 2004
Lancaster International Masters in Practicing Management	‘Designed around managerial mindsets rather than functional silos, the IMPM focuses on the very essence of what it means to practise management’. Residential modules, reflective papers, group tutorials and work-based projects.	45
Liverpool John Moores MA in Strategic Human Resources	Designed to facilitate the development of critically reflective practitioners and involves critique current theory and its relevance to practice. Six action learning sets support the dissertation. (Researched by Aileen Lawless, 2008)	7
University of Central England MSc in Organisational Development and Management Learning	Part-time programme delivered via critical action learning. (Researched by Reynolds and Trehan, 2001; Rigg and Terhan, 2004; Trehan and Rigg, 2007. Institution now called Birmingham City University)	17

In selecting the research sites I deliberately avoided those at Lancaster where I was a student and also the programme at the University of Central England which had been

researched by Reynolds and Trehan (2001). In 2004 I knew very little about the programmes at Huddersfield, Liverpool and Bristol hence I made my selection from those running at Ashridge, Bath and Exeter. Having been a student at Ashridge and an employee at Exeter, I believed that they were consistent with my sphere of interest and I also had the benefit of good contacts to gain access. Both were two year part-time residential postgraduate programmes designed for people performing senior roles associated with management and/or leadership in work organisations. In 2004 when I decided to focus on these programmes, I did so on the basis that I understood each of them enough to know that they aimed to enhance the professional practice of their participants whilst challenging existing assumptions and perspectives in relation to management, leadership and organisations with a view to achieving some form of transformation within the learner. My understanding of the Exeter programme was informed by personal involvement in its management and close collaboration with academic colleagues responsible for its design and delivery. My understanding of the ethos and aims of the Ashridge programme was informed by participation as a student on an Ashridge leadership development programme (1997-1999) which borrowed faculty, curriculum and learning processes from AMOC. I also discussed my choice with a member of the AMOC faculty, who had been my tutor at Ashridge, and as a result confirmed that the AMOC was a suitable site for my research. Hence these sites were selected early in the research process after an initial literature review but *prior* to the fully developed review which now appears in this thesis. Therefore I did *not* establish a set of characteristics and then go in search of programmes which matched. Instead I selected two programmes with which I was already very familiar on the basis that they exhibited characteristics consistent with my area of interest, including:

- Involving reflection on experience

- Utilising a broad range of theoretical perspectives
- Promoting an understanding of organisations as complex social processes (in contrast to linear, mechanistic ways of understanding)
- Developing capacities for critical thinking and its application to knowledge, organisational practice, and personal belief systems
- Aiming to enhance the professional practice of participants
- Seeking to achieve some type of transformation within the learner.

In 2004 I was working with an eighteen-month timeframe towards an MPhil thesis, so I was keen to work with research subjects who were well established in their learning process and were in the midst of transferring their learning into practice. Hence I chose to research the 2003-2005 cohorts on the University of Exeter MA in Leadership Studies and the Ashridge MSc in Organisational Consulting (AMOC). Both cohorts were coming to the end of their taught phase and were about to embark on their dissertations. In order to develop a detailed understanding of the aims, curriculum, learning process and intended learning outcomes of each programme, I gathered data from a number of sources in early 2005. These sources are documented in the following sections which provide descriptions of the aims, curriculum, learning process and theoretical perspectives associated with each programme. Later in the research project these programmes were 'tested' against sections 2.2 and 2.3 of the fully developed literature review which now appears in this thesis. This comparison was undertaken in order to determine the extent to which these programmes could legitimately be regarded as examples of *learning to change the game*, more specifically action-based education or critical management education (Korpiaho *et al.*, 2007).

### **3.2 The Exeter programme**

The information gathered for the Exeter MA in Leadership Studies constituted the programme brochure (2003), residential module timetables (2003-2005), and the student handbook (2003-05) which contained an overview of the syllabus, intended learning outcomes and reading lists. A copy of the “Invitation to Study” (2003) provided by Programme Director of the parallel e-learning programme, was also obtained. Although written for the e-learning programme, the author was personally involved in the design and delivery of the residential programme and confirmed that the same principles and philosophy were employed. The AMOC Fieldbook (2005) contained a description of the programme director’s perspective and I was therefore keen to try to obtain equivalent data for the Exeter programme. I decided to do this by conducting a semi-structured interview with the programme director (November 2005), which was tape recorded and subsequently transcribed.

The Exeter Masters in Leadership Studies commencing in October 2003, was a 2-year part-time programme designed for experienced people facing the challenges of a leadership role. It was delivered via seven modules comprising five 5-day residential weeks, a 5-day ‘leadership exchange’ and a 5-day consultancy intervention. The leadership exchange involved pairs of students taking turns to observe and to be observed ‘doing’ leadership in the workplace. The consultancy intervention involved small teams of students (typically 3 to 5) undertaking a real-life consultancy project relating to leadership, in an organisation other than their own. Students completed seven written assessed assignments followed by a Masters dissertation. In addition students maintained a personal learning log to reflect on the course materials, learning events and the challenges which they faced back at work both in terms of their role

and the application of their learning. The programme literature made bold claims about the programme's transformative aims and expressed an explicit intention to challenge each participant's frame of reference. There was a clear rejection of an instrumental orientation and instead of focusing on leaders the faculty invited participants to view leadership through multiple lenses and to explore it as a complex social phenomenon.

### **3.2.1 Aims**

Faculty designing and delivering the Exeter programme aimed to help participants become better leaders (Exeter brochure, 2003) and yet there was a clear rejection of a purely instrumental orientation:

“That would be on the no list – simply delivering a set of convenient tools and techniques.....There is a wider role for universities than simply delivering what society thinks it wants now...we are all well versed in the fads and fashions of the management industry...it's yet another extension of the rationalisation of organised society...this is how you get people to work better.”

(Interview with Programme Director, 2005)

The brochure made bold claims about the programme's transformational aims:

“...you will find the thoughtful provocation insightful and illuminating and ultimately transformational – for both you and your organisation.” (Exeter brochure, 2003)

This was reiterated in the joining instructions, which expressed an explicit intention to challenge each participant's existing frames of reference:

“So this course is designed to look below the surface at the underlying premises of our everyday notions and habitual responses.” (Exeter Invitation to Study, 2003 p1)

These descriptions have similarities with the process of perspective transformation described by Mezirow (1990, 2000) yet the Programme Director expressed some slightly less ambitious intentions:

“Not that someone has changed the way they think but has increased the space in which their thinking takes place.” (Interview with Programme Director, 2005)

### **3.2.2 Faculty perspectives**

The faculty rejected the more typical focus on *leaders* and instead focused on leadership as a complex social phenomenon (Interview with Programme Director, 2005). To do this they invited participants to view *leadership* through multiple lenses including canonical knowledge alongside contemporary perspectives which challenge taken-for-granted commonsense practice and its theoretical origins:

“Once we begin to analyse leadership through poststructural and postmodern critical lenses the process of collaborative organising takes on a decidedly different hue. What we thought was safe and secure ground begins to wobble and we are prompted, it might seem somewhat inconveniently, to reshape our thinking.” (Exeter Invitation to Study, 2003 p3)

Consistent with this plural approach, the Programme Director described how he deliberately included subject matter with which he disagreed in order to avoid imposing his own values on the programme in an unreflective manner. For example the MBTI psychometric was employed but this was immediately followed by a critique of the instrument. Similarly the psychology oriented approach to the study of leadership was included but immediately critiqued. He described how he wanted to ‘create a space where all views should be treated properly’, including the participants’ views, indicating a degree of reflexivity with regards to the learning process (Interview with Programme Director, 2005).

The Exeter faculty aspired to create a ‘reflexive theatre of learning’ combining ‘the posing of intelligent questions supported by academic study, with critical reflection on and changes in personal practice’ (Exeter Invitation to Study, 2003). This critical perspective included problematizing the mainstream machine metaphor representing organisations and posing questions in order to surface interests, politics, power and control (Exeter Joining Instructions, 2003). The Programme Director confirmed that the programme could ‘most definitely’ be described as critical and talked about resisting “the more popularist language of the market that leadership is all about certain key techniques and tools”. The joining instructions went further:

“You will also be in a position to discriminate between ‘dogmatically stated nonsense’ and more sophisticated ideas that offer genuine insight into the process of organizing and organization (see Heifetz, 1994; Grint, 2000).” (Exeter Invitation to Study, 2003, p1)

The critical orientation of the Exeter programmes also includes a resistance to the natural science approach for the study of human activity and instead an acknowledgment of the political, ethical, social and philosophical nature of managerial practice:

“Need to study organizations as embedded in specific historical conditions – constituted by social, political and economic practices of a given time and space”  
(Extract from Case, P. 2003)

### **3.2.3 Curriculum**

The curriculum included didactic and dialectic elements with the former providing a thorough exploration of classical and contemporary leadership theories, ethics, power, identity, culture, creativity, organisational change, organisational learning, decision-

making, diagnostic and problem-solving skills, strategic thinking, concepts of self and others, future work patterns and the global impact of new technologies (Exeter student handbook, 2003). This was accomplished by drawing on the inter-disciplinary fields of social psychology, organisation theory, psychology, sociology, strategic management, cultural theory, institutional studies, social anthropology and philosophy (Exeter brochure 2003, Exeter student handbook, 2003).

A broad range of theoretical perspectives on leadership were included ranging from the canonical ‘great man’ thinking on leadership emerging mainly from the US in the 1950s and 1960s, alongside classical Greek philosophy, non-western traditions (e.g. Islamic, Buddhist, Chinese philosophies), scientific thinking originating from the European Enlightenment, through to “‘upstream’ theorising of the relational processes of leadership” (Exeter Invitation to Study, 2003, p3). There is no explicit mention of critical theory and during the interview the Programme Director expressed his disinterest and suspicion with regards to critical management studies. However, the syllabus plan indicates a critical orientation involving subjects such as cultural awareness of late capitalism and the gendering of ‘great man’ theories of leadership (Exeter Student Handbook, 2003).

### **3.2.4 Learning process**

Didactic teaching of the curriculum was combined with dialectic methods of learning:

“The conceptual dimensions of the programme make up less than half the story; for the primary emphasis must be on creating a supportive and facilitative learning environment in which you, the participant, are aided in reflecting on your own leadership practices, assumptions and responses.” (Exeter Invitation to Study, 2003, p4)

In part this was achieved through action learning sets which were held throughout each residential module with reflections being recorded in each participant's learning log. The module descriptor for the Learning Log confirms this with 'action learning' listed within the teaching methods and 'problem solving through action learning' within the syllabus plan. In addition the students generated their own knowledge through taking part in a leadership exchange (on which they reflected in a written paper) and undertaking a consultancy assignment (followed by an assessed reflective paper).

The brochure and other sources described how the students' own experiences would be central and that critical reflection would be involved:

“What we hope to create is a deliberately reflexive theatre of learning, in which your experiences – individually and collectively – will play a leading role. This entails combining the intellectual skills of systematic inquiry, that is, the posing of intelligent questions supported by academic study, with critical reflection on and changes in personal practice.” (Exeter Invitation to Study, 2003 p4)

However, while this appears to constitute critical self-reflection of the form designed to raise self-awareness, it is unclear whether the students engaged in critical social-reflection consistent with the definition of *critical reflection* as defined earlier, in which critical theory was cited as an essential component (Burgoyne and Reynolds, 1997; Reynolds, 1997; Brookfield, 2000). It is not possible to assess the extent to which critical perspectives were applied by faculty to the learning process although as outlined earlier, the Programme Director carefully avoided imposing his own values on the programme in an unreflective manner.

### 3.2.5 Comparison with literature review

The Exeter programme embodies many of the defining characteristics of *critical management education* including a challenge managerial ideology and practices, a focus on the social rather than the individual, didactic teaching including traditional and critical resources, problematizing positivist views, surfacing values and interests, a focus on power and knowledge. However, it is not a complete example of critical management education because it lacks two essential ingredients namely, critical social-reflection involving critical theory, and an intention to generate political action. The programme also includes elements of *action-based education* as evidenced in the action learning sets held throughout each residential module. The range of theoretical perspectives introduced by faculty, without the promotion of any particular theme, indicates that the programme may be an example of Critical Action Learning in which educators provide speculative and emancipatory knowledge, requiring participants to convert this into performative knowledge to improve the quality of their practice (Burgoyne, 1994; Pedler *et al* 2005).

### 3.3 The Ashridge programme

Source documentation for the Ashridge programme constituted the Ashridge programmes guide (2005), Ashridge website (2005) together with a copy of the *The AMOC Fieldbook of Radical Consulting* (Critchley and Higgins 2005). This document contained an overview of the syllabus, aims and intended learning outcomes of the AMOC programme together with five areas of theoretical interest that frame the programme from a faculty perspective. A significant proportion of this fieldbook was subsequently published in a book entitled *Organisational consulting: A relational perspective* (Critchley *et al*, 2007).

The AMOC programme commencing in 2003 was a part-time 2-year programme designed for experienced consultants or change agents wishing to work more effectively in organisations. It was delivered via ten 3-day workshops and participants were required to complete a series of tutor-supported written assignments followed by an action inquiry based dissertation. In between the workshops students attended 1-day application groups to review and reflect on their learning, facilitated by a tutor. Each application group comprised three to five students who remained in the same application group with the same tutor throughout the programme.

### 3.3.1 Aims

The programme involved action learning, theoretical rigour and reflection on experience designed to develop the professional capability of the participants. This emphasis on personal development is encapsulated within the programme aims which include:

To provide experienced practitioners with a forum in which to develop their practice within a learning framework intended to (*develop?*):

- their understanding of themselves and the complex array of attitudes and beliefs they express through their practice, and
- their critical appreciation of organisations and the perspectives they bring to bear.” (Critchley and Higgins, 2005 p209)

The learning outcomes focus almost entirely on personal development and include aspects such as a heightened awareness of self and of group dynamics; an increased ability to work effectively with group and power dynamics; an understanding of broader theoretical perspectives in relation to organisations, leadership and change; an enhanced sense of presence and confidence; an increased competence in consultancy

and facilitation of activities (Critchley and Higgins, 2005). In addition to developing the programme participants, the faculty explicitly promoted a particular *modus operandi* among its graduates, as evidenced in the programmes aims:

“To promulgate Organisational Consulting as a distinctive and ethical practice, informed by the perspective that organisations are complex social processes and that consulting is a participative act with consequences which may be anticipated but not predicted.” (Critchley and Higgins, 2005 p209)

There is no explicit reference to the idea of emancipation which is so central to the *critical pedagogy* defined by scholars (e.g. Reynolds, 1997) but the Programme Director’s mission includes an element which might feel emancipating to hard pressed staff within work organisations:

“...he also has a more personal mission to enhance the ‘aliveness’ of organisational life.” (Critchley and Higgins, 2005, p5)

There is even some suggestion that the betterment of society might feature within the programme director’s aims given that we are told that he:

“...works to overcome the obsessive tyranny of profit and shareholder value over all other purposes that organisations serve.” (Critchley and Higgins, 2005, p5)

### **3.3.2 Faculty perspectives**

Within *The AMOC Fieldbook of Radical Consulting* (Critchley and Higgins, 2005) key members of the AMOC faculty set out five areas of theoretical interest which framed the AMOC programme and influenced their own consulting practice. These include the social constructionist discourse, relational psychology, complexity thinking, inquiry and reflective practice and a dialogic orientation. The AMOC faculty described how they consistently rejected mechanistic understandings of organisational life and the positivist paradigm from which such views originated:

“The MSc in Organisational Consulting emerged out of the energy and commitment of a small group of people.....to promulgate this philosophy of consulting as an alternative to the prevailing positivist paradigm” (Critchley and Higgins, 2005, p208)

Instead organisations are viewed as complex social processes and organising is regarded as an ongoing activity:

“Broader perspectives on the phenomenon of organisation, and in particular understanding organisations as complex social processes, and the implications of this perspective for leadership, change, and organisation consulting.” (Critchley and Higgins, 2005 p210)

“A view of organisations as socially constructed phenomena subject to development through conversation.” (Critchley and Higgins, 2005, p210)

“...the process of organising can be described as “people in communicative interaction”” (Critchley and Higgins, 2005 p4)

This is supported by a conviction that language is central to the conduct and understanding of all social life:

“This way of working assumes that language is never neutral and does not represent ‘reality’ in an objective way. Words are loaded with historical, cultural and contextual attributions, and constitute both a creative and constraining force within our lives.” (Critchley and Higgins, 2005, p57)

To reinforce this, there is an explicit rejection of Taylor’s *scientific management* and similar mainstream perspectives in which managers are regarded as neutral experts, designing and controlling organisations:

“It is the antithesis of a world where people are reduced to alienated units of production to be corralled and brainwashed into fitting into the plan of some over-arching and rational chief engineer.” (Critchley and Higgins, 2005 p62)

There is also a direct challenge to instrumental rationality by a member of the faculty who:

“...sees the need to move away from a worldview built around the notions of individualism, efficiency and alignment.” (Critchley and Higgins, 2005, p61)

### 3.3.3 Curriculum

As outlined above, the key theoretical threads within the AMOC programme included the social constructionist discourse, relational psychology, complexity thinking, inquiry and reflective practice and a dialogic orientation. In addition an understanding of Gestalt Psychology was present among the faculty and the AMOC students picked up on this even though it had ceased to be on the curriculum (Critchley and Higgins, 2005). These key theoretical threads merit further elaboration in order to understand the curriculum to which the AMOC participants were exposed. The *social constructionist* perspective was discussed earlier within the Literature Review in chapter 2, but the materials indicate that the AMOC faculty had a particular take on this drawing on the work of the social scientist Gregory Bateson. Bateson’s work is notoriously difficult to summarise but it includes staying curious, seeking beauty rather than power, challenging habitual ways of understanding, paying attention to interconnections and pulsating patterns of relationships. *Relational psychology* is reviewed later in chapter 4 in connection with Stacey’s (2000) ideas on complexity. Contrary to the mechanistic view of organisations embedded within traditional thinking, *complexity thinking* rejects the notion of cause and effect and instead regards organising as an outcome of communicative interactions between people (Critchley and Higgins, 2005). Influenced by the work of Ralph Stacey and Patricia Shaw, there is an emphasis on relationships, patterns of communication and how people interact with each other in local situations. Individual identities are regarded as relational and

organisations are viewed as complex social processes in which outcomes are unpredictable. In essence it emphasises humans and humility rather than hubris.

*Inquiry and reflective practice* is a complex area defined as “what it takes to be both a knowing and unknowing consultant at the same time” (Critchley and Higgins, 2005 p9). A *dialogic orientation* is similarly complex, but relates to “seeing connectedness and working with engrained assumptions” (ibid). There are several references in the programme materials to ‘understanding and working with power dynamics’ but this appears to be focused on *interpersonal power* such as persuasion and *organisational structural-cultural power* such as rules, hierarchy and cultural norms rather than societal dimensions of power such as power associated with ownership of wealth in capitalist societies (Watson, 2002).

### **3.3.4 Learning process**

The overall approach is described as experiential, to encourage self reflection, provoke critical thinking and stimulate experimentation with new learning (Ashridge Programmes Guide 2005). Ten 3-day workshops interspersed with 1-day facilitated application groups to review and reflect on learning created an action-based learning process:

“A rigorous process of self-development based on the principles of action learning and action inquiry” (Critchley and Higgins, 2005, p210)

Extending these principles into practice, the final dissertation was based on the principles of action inquiry and required each participant to apply their learning to a situation within their organisation. Thus the learning process focused on the lived experience of the participants:

“Our experiential approach builds on your existing skills, provokes self-reflection, and integrates new learning into your practice from the start.” (AMOC website, 15/6/2005)

Critical self-reflection of the form designed to raise self-awareness is clearly a feature of the programme but there is no evidence that the students engaged in critical social-reflection in which critical theory was cited as an essential component (Burgoyne and Reynolds, 1997; Reynolds, 1997; Brookfield, 2000). The faculty intended the learning process to be non-hierarchical with an emphasis on partnership:

“Our approach to teaching is based on developing an adult partnership with participants, rather than a dependent relationship as found in the traditional teacher-pupil, classroom based situation.” (Critchley and Higgins, 2005 p211)

This appears to be consistent with the experience of one graduate who described his learning as co-created in the sense that:

““Faculty...knew the territory to be covered, but did not know the exact nature of journey which would be jointly undertaken” (Critchley and Higgins, 2005 p211)

### **3.3.5 Comparison with literature review**

The AMOC programme corresponds with the description of *action-based education* in section 2.2 (Korpiaho *et al*, 2007) and *action learning* within a Higher Education context detailed in section 2.3 (Pedler *et al*, 2005). There is a close correlation with the Experiential School of action learning with the dual aims of problem solving and personal development. Facilitated learning groups are a central feature of the programme, enabling real-time problems to be brought into the learning arena. However these learning groups are also core to the personal development process in that they are used to enable participants to surface, discuss, review and possibly revise their pre-existing knowledge and assumptions about themselves, their roles and the

organisations for which they worked. The AMOC programme appears to match all ten key features of action learning in Higher Education (Pedler *et al*, 2005) listed in chapter 2. However, this list is very task oriented whereas the AMOC programme appears to focus much more on personal development and taught elements including learning about new perspectives such as complexity thinking.

### **3.4 Summary**

This review has demonstrated that both of the selected programmes are examples of *learning to change the game* (Korpiaho et al 2007). The AMOC programme mirrors the characteristics of action-based education with elements which entitle it to be labelled Critical Action Learning. The Exeter programme appears as a hybrid form, combining elements of action-based education and critical management education. What is particularly interesting is that unlike MBA programmes, neither of these programmes was sold on the basis of improving personal salary, career prospects, or organisational financial performance. Instead they offered to improve the *quality* of personal practice and organisational life for others. They were clearly connected to the reality of practice both through their experiential approach and through programme content which offered perspectives on organisations and organising consistent with research findings. This included challenging many of the ideological, economic, political and cultural influences which have shaped mainstream management education and practice, including instrumental rationality and the scientific paradigm. Most significantly, they both embodied the intention to challenge existing assumptions and perceptions with a view to achieving some type of transformation within the learner, and they followed through this intention with learning processes and curriculum designed to make transformation possible. They both combine a focus on practice with a critical perspective and are entirely

appropriate as sites for this research. Throughout the remainder of this thesis they are referred to as “critical postgraduate management education”.

## 4 LITERATURE REVIEW – PART II

Criticisms of mainstream management education provided a point of departure for my research, so, part II of the Literature Review begins with an outline of this debate set within its historical context. However, the majority of this chapter reviews the dominant and alternative frames of reference through which managerial practice is theorised and understood. This is organised around systems-control thinking to represent the dominant view, and the process-relational perspective as an alternative and more contemporary view (Watson, 2002), and various studies which have attempted to reveal the *real* nature of managerial work (e.g. Mintzberg, 1973). What intrigued me about this area of the literature was that there seemed to be no absolute truth in terms of defining an *effective manager*, but simply competing discourses some of which appeared to have dominated at different points in time in different contexts. As the research progressed I realised that my reading of the literature was increasingly from a feminist perspective perhaps originating from my experiences as a female manager travelling in a male world (Marshall, 1984). Therefore the final section of this chapter engages with what has been said about the overlap between management and masculinity, and the emerging contemporary preferences for a post-heroic approach and the so called *female advantage*. This chapter provides a foundation for interpretation of the research findings in Chapter 7 and also informs the discussions in Chapter 8 which focus on the implications of my research findings for management and management education.

### 4.1 Management education – debating failure

An overview of the origins of management education in the UK provides vital contextual backdrop for the debates about its alleged failings.

#### **4.1.1 The making of managers – an economic project**

Following the Second World War, the Marshall Plan recommended that Europe adopt America's managerial approaches in order to rebuild their economies (Anglo-American Council on Productivity, 1951). Initially American management consultancies such as McKinsey expanded into the UK armed with their management philosophy and methods. Then the Robbins Report (Committee on Higher Education, 1963) recommended the creation of two business schools in the UK, in London and Manchester, each offering postgraduate courses for practising managers (Currie and Knights, 2003). Following these examples the number of business schools in the UK increased to around 20 in the early 1980's with the majority offering MBAs based on the American model (Tiratsoo, 2004). During the early 1980's fears about economic decline alongside concerns about the capability of British managers resulted in the UK government initiating a number of programmes and policy changes designed to produce a more educated cadre of managers. Numerous reports were commissioned, each identifying shortcomings in the education and training of managers in the UK and recommending solutions (Mangham and Silver, 1987; Constable and McCormick, 1987; Handy, 1987; Handy et al 1988; Hirsh and Bevan, 1988). Among these *The Making of Managers* (Handy, 1987) compared management development in the UK with practices in the US, Germany, France and Japan and recommended the professionalization of management via a two-stage pre and post experience qualification supported by supervised practice, codes of behaviour, central sources of information and continuing professional development. In the same year *The Making of British Managers* (Constable and McCormick, 1987) recommended an increase in the scale of business school activity particularly part-time MBA programmes. Changes in government policy led to the Management Charter Initiative (MCI) and

the expansion of business schools, rising from 26 in 1985 to around 120 in 2003 (AMBA, 2006; Pfeffer and Fong, 2002). Most offered MBA programmes based on the American model and it is alleged that many have retained this approach partly due to the influence of accreditation bodies such as AMBA (Pfeffer and Fong, 2002). The MBA remains the dominant form of business school education for practising managers in the UK (AMBA, 2006).

Recent research studies have attempted to evaluate the success of management development and education programmes (Horne and Stedman Jones, 2001; Burgoyne *et al*, 2004; Bolden, 2005). Among these Horne and Stedman Jones (2001) focused on approaches to leadership development concluding that many employers perceive MBA programmes to be among the least effective. In contrast Burgoyne *et al*'s report (2004) on behalf of the Department for Education and Skills reviewed and summarised studies defining the skills, knowledge, behaviours and personal attributes said to be required by managers (including leaders) in order to do their job well. This included studies by Mintzberg (1973), Bass (1985), Goleman (1996), Mabey and Thomson (2000), and Beech (2003) among others. The picture painted by Burgoyne *et al* (2004) is characterised by *complexity* (one thousand and thirteen leadership abilities mentioned in the literature), *opinion* (in that the link between abilities and performance is implied rather than proven), *gender bias* (many competency frameworks are based on American research involving male senior managers) and *contradiction* (managerial behaviours said to be required are not those which are rewarded). New capabilities such as emotional intelligence, empowerment, motivation and resilience have simply extended the original lists which included planning, organising and delivering results. Burgoyne *et al*'s (2004) review highlights

practical issues (which capabilities do we need to develop), political issues (what learning outcomes are deemed valuable) and philosophical questions (on the role of managers within contemporary organisations).

Similarly Bolden (2005) has highlighted the plurality of approaches to leadership development arising from shifting conceptions of leadership. Since the early 1970s definitions of good leadership have migrated from personal qualities (traits), behavioural styles, situational theories, and transformational (inspirational) leadership through to more recent inclusive models involving servant leadership, power sharing and collective engagement (Bolden, 2004). Leadership developers are urged to attend to both human capital (individuals) and social capital (interpersonal networks) (Cunningham, 2002). For individuals this means developing their intrapersonal skills (e.g. self-awareness), interpersonal skills, cognitive abilities, communication skills and task-specific skills all of which accords with the argument that:

“...there is no difference between becoming an effective leader and becoming a fully integrated human being.” (Bennis, 1999 p23)

Therefore attempts to evaluate the success of management education are complex and contested. When educators determine the content and learning process for management education programmes, do they have a clear idea about the type of practitioner they are trying to produce? In this contested space educators make decisions about the knowledge to be acquired, the skills to be honed, the perspectives to be appreciated, the behaviours to be practiced, the personal qualities to be strengthened and the understanding of people, business, the economy and the world to be developed. Hence these decisions are necessarily value judgements influenced by numerous factors such as personal experience, education, beliefs, values, self-interest,

students' expectations, peer pressure and local conventions all within institutions which are monitored and partly funded by agencies representing central government's interest in full employment and economic development.

#### **4.1.2 Debating failure**

Against this backdrop, academics have been voicing concerns about the purpose, format and content of business school programmes since the early 1980's. Concerns have also appeared in popular media such as the Economist and the Financial Times. As the body of literature on the alleged failings of management education continues to grow, the critique focuses on three key elements namely *instrumental failure* (not doing what they claim), *ethical failure* (producing consequences of questionable value) and the *disconnection between teaching and management practice*.

##### **4.1.2.1 Instrumental issues**

According to key academic journals on management education (Korpiaho *et al*, 2007) the goal of both *mainstream* management education (MBA and similar traditional forms) and *revised* forms of management education (science-based and competency-based) is to produce competent managers who will generate economic benefit. This goal is also expressed in initiatives sponsored by UK government (e.g. CEML, 2002). Hence, those who accuse business schools of instrumental failure with regards to management education focus on this goal but question the means by which business schools attempt to achieve it. Given that business schools in the UK rarely engage in science-based or competency-based management education, this criticism is levelled at MBA programmes and similar traditional forms of discipline based management education.

The behaviour of Governments, business schools and employers of MBA graduates appears to be based on the *belief* that there is a relationship between management education, management practice, organisational performance and economic competitiveness (Burgoyne *et al*, 2004). If this belief is well founded then a trained manager should be better than an untrained one, as with other professionals such as doctors (Grey and French, 1996). However, the ‘trained better than untrained’ argument has been contested on the basis that there is very little evidence in support of the supposedly proven cause and effect relationships between business school management education, management practice, organisational performance and economic competitiveness (Burgoyne *et al*, 2004; Grey, 2002 and 2004; Mintzberg, 2004; Pfeffer and Fong, 2002). In the UK there is no published evidence linking management education with organizational performance (Burgoyne *et al*, 2004). Anecdotally, some employers have claimed that MBA graduates contribute to improved financial performance on projects but any evidence of this appears to remain unpublished (*ibid*). This mirrors findings in the US where published research indicates either minimal or no evidence of a link between success at business school (high grades etc) and success in business, either personal (such as career progression) or organisational (such as growth and profitability) (Mintzberg, 2004; Pfeffer and Fong, 2002). In terms of individual performance, researchers have looked for some correlation between business school education and personal career success in the form of salary increase, career progression and managerial competence (Pfeffer and Fong, 2002). In the UK there is considerable evidence that MBA graduates benefit from enhanced career progression and salary increases, particularly one-off increases immediately following graduation (Burgoyne *et al*, 2004). However, there is little evidence relating to the impact of an MBA on individual competence at work (*ibid*).

Overall the studies are few and the findings are mixed suggesting that a strong link between business school education and individual performance has yet to be demonstrated (Burgoyne *et al*, 2004). Therefore, if management education is supposed to serve economic interests then it can be argued that it is failing.

Despite this, large numbers of students continue to enrol on MBA programmes (AMBA 2006, 2008) possibly motivated by selfish motives such as securing promotion, getting time out, networking or launching a career change rather than a desire to generate organizational and economic performance.

“MBA courses inevitably appeal to students’ instrumental interests in securing their own future career.” (Roberts, 1996 p73)

Such motivations are fuelled by MBA marketing campaigns which highlight personal benefits and the FT ranking of business schools which focus on alumni salaries and career progression as key measures of the highest ranked programmes. Furthermore, the dominant culture within the UK encourages a selfish orientation:

“The axial principle of the culture is the desire for the *fulfilment and enhancement of the self*.” (Bell, 1973: p12)

Consequently people might be attracted to management education because of the professional status, prestige and financial reward bestowed on them simply by having the right qualification (Thomas and Anthony, 1996). What’s more, having the right qualification, from the right University (the most prestigious) results in much higher earnings (Pfeffer and Fong, 2002). Evidence suggests that many employers recruit from the most prestigious business schools not because of the curriculum and hence what the students have learned, but because of the quality of the student body (*ibid*). Thus it can be argued that business schools play a significant role in screening and

recruiting for employers as well as socialising students by developing a shared language and values (Grey, 2002). As demand for business school graduates has grown in recent years, it is in the interests of business schools to remain complicit in this alleged 'charade' (ibid).

This highlights the contradiction between the factors used by educators and policy makers to assess the instrumental worth of management education (individual competence, organizational and national performance) and the factors potentially influencing its participants (personal pleasure, prestige, promotion, salary increase). If university based management education is supposed to produce competent managers who will generate organisational and national economic performance, then through a lack of convincing evidence it is open to allegations of instrumental failure. However, if other goals are included in the analysis, such as socialising people into a managerial mindset, creating strong networks, screening candidates for managerial appointments, growing premium fee income streams for UK universities, then it is possible to create a different story about its success.

#### ***4.1.2.2 Ethical issues***

Management education has been accused of *ethical failure*, with critics arguing that the outcomes of management education are of questionable value. These arguments are typically mounted by calling into question the nature and purpose of a 'competent manager'. Accusers claim that management education produces the *wrong type of manager* with examples of *wrong* ranging from too control oriented (Grey and French, 1996; Roberts, 1996; Willmott, 2004), too masculine (Simpson, 2006; Sinclair, 1995; Wheatley, 1999), too complicit in worker exploitation (Anthony, 1986), too focused on profit to the detriment of social and environment concerns (Thomas, 2003;

Wheatley, 2001), too focused on analysis at the expense of skilled interpersonal interactions (Mintzberg, 2004; Mintzberg and Gosling, 2002a, 2002b).

Management education in general and MBAs in particular, have been blamed for emphasising skills and behaviours which are culturally associated with masculinity (e.g. Simpson, 2006; Sinclair, 1995; Wheatley, 1999). Sinclair's (1995) research in Australia concluded that MBA programmes validated masculine values of control and domination, that men were the subject of the majority of case studies, and that female students were marginalised within the learning environment. More recently, based on an extensive review of recent literature on management and management education, Simpson (2006) has argued that many MBA courses embody masculine ways of learning and of being a manager resulting in an individualistic and competitive orientation. Simpson (2006) has argued that the curriculum and learning process on many MBA programmes generates a particular way of 'seeing the world' leading to a focus on mastery of 'hard' skills (data analysis, decision making, business planning, financial control) whilst neglecting 'soft' interpersonal skills (motivating, inspiring, nurturing, building relationships) which are deemed to be required within contemporary organisations (Alvesson, 1998; Hendry, 2006; Kanter, 1989; TopMBA, 2005; Wheatley, 1999).

Another version of the *wrong type of manager* comes from those who view managers as complicit in the exploitation of workers (e.g. Anthony, 1986). Following government initiatives to professionalize management in the 1980s, Reed and Anthony (1992) drew attention to the gap between critical studies highlighting managerial power, politics and morality and the relatively uncritical 'mainstream'

management education involving rational models and the development of technical skills. Similar contributions from Willmott (1994), Grey and Mitev (1995) and French and Grey (1996) each challenged the uncritical managerialist agenda allegedly central to mainstream management education. The extent to which they were also challenging the prevailing capitalist system was often opaque.

Worker exploitation and adversarial industrial relations within heavily unionised organisation may seem a thing of the past, but the question of the outcomes and interests served by managers, lives on in a new form. More recently it has been argued that managers should serve not only economic interests but social and environmental ones as well (e.g. Thomas, 2003; Wheatley, 2001). Encouraged by the increasing momentum of the public discourse on sustainability within the UK, social and environmental responsibilities are increasingly assigned to managerial roles. The greedy unregulated behaviour which is believed to have led to the global financial crisis and hence worldwide recession has resulted in suggestions that we are entering a post-capitalist era. This has generated more contemporary versions of Grey's (2004) original assertion that management education needs to change:

“The business school model now looks increasingly irrelevant and unfit for purpose in an era marked by problems such as climate change, energy and food supply crises, widening inequalities and struggles for corporate and global governance.” (Pedlar and Trehan, 2009)

This brief discussion of the alleged instrumental and ethical failings of management education reveals it as a complex and contested space in which there are interweaving concerns about what society considers to be desirable knowledge, skills, behaviours and outcomes for people in managerial roles and hence what counts as appropriate

education for them (Atherton, 2005). At the centre of this dilemma lies the question of whether managerial work is a scientific or a social activity which has given rise to a popular debate on the apparent disconnection between teaching and management practice. This debate is worthy of review because it crystallises the ways in which different conceptions of managerial work have a fundamental impact on the content, learning process and aims of management education.

#### ***4.1.2.3 Teaching versus practice***

This debate focuses on the apparent contradiction between management as taught and as practiced featuring contributions from two influential scholars, namely Henry Mintzberg and Barbara Czarniawska. These scholars have been selected because of their reputations within the fields of management and organisation studies respectively, because of the widespread reactions which their contributions provoked and also because they argue ‘the problem’ from two very different perspectives, which generates useful insights.

Mintzberg built his reputation on empirical studies in the US (1973) since when has argued that there is a contradiction between management as taught and as practiced (Mintzberg 1973, 1989, 1990, 2004). He has become one of the most well known critics of ‘MBA style’ management education arguing instead for an integrated approach and the development of strong interpersonal skills (Gosling and Mintzberg, 2003; Gosling and Mintzberg, 2004a and 2004b; Mintzberg and Gosling, 2002a; Mintzberg and Gosling, 2002b). This culminated in the book *Managers not MBAs* (Mintzberg 2004), one of the most high profile criticisms of MBAs ever published by a leading academic. The book focuses on conventional MBAs which Mintzberg defines as full time programmes attended by young people, often in their twenties,

focusing on understanding the business functions. Many innovative programmes in Europe, especially in England do not all fall within this definition, but most are still based on the dominant design. Mintzberg (2004) argues that management is a combination of science, art and craft but is taught as if it were predominantly a science. Based on this he criticizes many MBA programmes for mistakenly promoting analysis and decision making as key management skills, thereby constructing the idea of the 'heroic manager' who analyzes, calculates, plans, makes decisions, and allocates resources so that others can implement. He regards this as contrary to the *real* practice of managing which is described as a craft characterized by fragmentation, ambiguity, emotion, people, immersion, intractable problems and complicated connections. He observes that these softer issues are often marginalized in elective modules on topics such as leadership and ethics. Thus Mintzberg argues that management education legitimizes and encourages a mean calculating style of management which focuses on shareholder value, short term improvement and efficiency to the detriment of experimentation, human values and social wellbeing. Furthermore, he criticises segmentation of curriculum into functional disciplines, claiming that what they are learning is not management.

“Management is not marketing plus finance plus accounting and so forth. It is about these things, but it is not these things.” (Mintzberg 2004, p33)

Seven reviewers of Mintzberg's book agreed with the central premise that management is not a science and cannot be taught as such (Armstrong, 2005; Barnett, 2005; D'Andrea Tyson, 2005; Feldman, 2005; Kleinrichert, 2005; Lewicki, 2005; Miles 2005). Many of the US based reviewers also agreed with this as a basis for criticizing MBA programmes (Feldman, 2005; Lewicki, 2005; Miles, 2005), but

others found fault with Mintzberg's logic or empirical evidence (Kleinrichert, 2005; Barnett, 2005). UK based reviewers felt that many programmes in the UK might not be valid targets for his criticisms due to recent innovations (Armstrong, 2005; D'Andrea Tyson, 2005). Beyond this there was disagreement among the reviewers about the extent to which his criticisms were valid, particularly in relation to MBA programmes in the UK.

In her article *Forbidden Knowledge* Barbara Czarniawska (2003) argues that there is a significant gap between much of the knowledge taught within management education and organizational knowledge arising from research. In his editorial introduction to Czarniawska's article, Grey (2003) argues that while this type of gap exists in other subjects, it does not exist to the same extent:

“I don't think that this situation obtains, or not at least to anything like to same degree, in any other subject taught in universities.” (Grey 2003, p349)

Czarniawska (2003) describes the gap between *knowledge we have* (research findings) and *knowledge we teach* as significant and troubling and explores possible explanations for it. For example, within the *knowledge we teach*, an organisation is depicted as a goal-directed entity and managing is treated as a rational activity. However within *knowledge we have* an organisation is perceived to be the result of an organising process and managing is basically muddling through, relying on colleagues' inventiveness and pride to get things done. Czarniawska attempts to explain differences between these two bodies of knowledge. One possibility is that they represent *espoused theory* and *theory-in-use* these being an actor's version and an observer's version of the same action, or to put it another way, the difference between an ideal and a truthful description (Argyris and Schon, 1974). Czarniawska argues

that *espoused theory*, the *knowledge we teach*, is favoured not for its accuracy but because it provides a simpler model which is more aesthetically appealing than the reality of the *theory-in-use*. She rejects Argyris and Schon's (1974) idea that with time and reflection managers will favour *theories-in-use* because this overlooks the importance of expectations within organizations:

“They disregard the importance of legitimacy and social rewards (and sanctions) accrued by those who espouse ‘proper’ or just ‘fashionable’ theories.”

(Czarniawska, 2003 p359)

Hence Czarniawska (2003) argues that management educators are ensnared and complicit in the process of re-producing management knowledge in forms which claim to serve instrumental economic needs and students' desires for salary increases rather than imparting knowledge which accords with their research findings.

Following MacIntyre (1988), Czarniawska (2003) suggests that the *knowledge we teach* has been favoured throughout modernity (the last 200 years) because it embodies aspirations for control. However, based on empirical studies, she argues that this is merely an *illusion of control* casting events and our ability to control them in a rosy glow, with the same studies showing that depressed people do not suffer from this illusion and are therefore ‘sadder but wiser’ (Czarniawska, 2003).

However, Czarniawska's preferred explanation for the difference between *knowledge we have* and *knowledge we teach*, is based on Rorty's (1999) idea that hope is necessary for successful action from which she argues that the two alternatives express the difference ‘between what one hopes for and what happens’ (Czarniawska, 2003 p361). While not regarding this discrepancy as a problem in its own right, Czarniawska regards the *knowledge we teach* as problematic because of the *nature* of

the hopes which it expresses. These are hopes for certainty and control, consistent with the modernist ideals which influenced early conceptions of management.

Czarniawska (2003) argues that these ideals are a problem partly because they are unachievable, but more importantly because they are undesirable as they aspire to a form of human activity which is devoid of ambiguity and spontaneous cooperation, which is “perfect but dead” (ibid, p361).

All five commentators on Czarniawska’s article recognize the gap between *knowledge we have* and *knowledge we teach* although many do not believe that the problem is as acute as she claims (Clegg 2003; Grey 2003; Hassard 2003; Kreiner 2003; Weick 2003). Hassard (2003) disagrees with much of the article, claiming that there is evidence in textbooks and conferences of the *knowledge we have* coming to the fore. Kreiner (2003) appears to agree with Czarniawska in principle but argues that the problem can be solved by educators teaching both sets of knowledge using wit and irony! Clegg (2003) and Grey (2003) agree with Czarniawska that the *knowledge we teach* provides an illusion of control and that its appeal arises from political and philosophical influences which create a desire for control rather than understanding in contemporary society in the UK. Clegg (2003) suggests that the *knowledge we teach* acts as some kind of intellectual clothing, which is consistent with Czarniawska’s own ideas about people needing to espouse ‘proper’ or ‘fashionable theories’,

“Dress the mind as one dresses the body: cover its nakedness, its fear of shame, its loathing of being seen to be unfit.” (Clegg, 2003 p377)

Such intellectual clothing, Clegg argues, may enable managers to screen out the anxiety and fear and ward off the messiness of organizational life. This it enables publishers to sell vast numbers of books and it sells places on business school

programmes all of which offer the possibility of mastering business. Weick (2003) argues that the two sets of beliefs are not that far apart if one regards them as *representations* rather than two separate realities for managers.

So what do these contributions from Mintzberg (2004) and Czarniawska (2003) tell us about the ways in which different conceptions of managerial work have a fundamental impact on the content, learning process and aims of management education? Firstly Mintzberg's (2004) critique of MBAs operates at a descriptive level, seeking to reconcile taught skills, knowledge and behaviours with the managerial activities observed during his earlier empirical studies (Mintzberg, 1973). However, he does not ask why this gap persists and whose interests it might serve. Management education is big business both in the US and in the UK hence business schools have vested interests in their qualifications being perceived as valuable. Employers are also interested in maintaining the perceived value of an MBA degree as this enables some of them, such as consulting firms, to sell their staff's services at a premium price (Pfeffer, 2005). Secondly Mintzberg (2004) focuses on the means of managing, which he depicts as science, art and craft, criticising the way in which MBA programmes focus on science and the associated functional specialities such as accounting, finance and marketing. This is an old argument originally rehearsed in an International Management Institute (1986) report calling for integrative learning and holistic thinking, and subsequently repeated by Willmott (1994) who argued that segmentation of curriculum into functional disciplines does not help managers in their practice. Interestingly, recent MBA programme developments in the UK show a trend away from a curriculum based on functional silos and towards a curriculum which focuses on management issues (Bradshaw, 2005). Thirdly, Mintzberg (2004)

recommends that management education focuses on practising general managers who wish to improve their practice yet his book says very little about part-time and modular MBA programmes mainly attended by such people. Instead his argument is built upon a critique of conventional MBAs, these being full time programmes attracting young people typically in their twenties. Hence, not surprisingly, he complains that the majority of those who study for an MBA have insufficient managerial experience to benefit from management education. Full-time programmes for early-career students typically serve one set of outcomes (e.g. imparting a basic body of knowledge, launching careers) while part-time programmes for mid-career students serve a different set of outcomes (e.g. improving management practice). Mintzberg's focuses his attention on the former (full-time programmes for early-career students) but he criticises them for not producing the outcomes of the latter (part-time programmes for mid-career managers). This unhelpfully conflates into a single argument the diversity of MBA participants and programmes. This criticism can be levelled at all commentators who critique MBA programmes in a way which treats them as a homogeneous group. Research which shows that they are not homogeneous and neither are the students who participate in them (Mazza *et al*, 2005). Hence Mintzberg's arguments lack criticality, originality and robust logic suggesting that the attention devoted to *Managers not MBAs* say's more about Mintzberg's reputation and writing skills than the quality of his argument. However, probably because of his reputation, Mintzberg's book has been seen as a wake-up call to business schools which risk becoming servants to short-term economic interests rather than character-forming institutions with broader responsibilities to society (Chia, 2005).

In contrast Czarniawska's (2003) article and the associated reviews provide an insightful treatment of the binary debate between 'textbook' and 'lived reality'. Czarniawska draws attention to different ways of understanding organizations and people and the implications that this has for conceptualising the nature of managerial practice. She recognises that much of what is taught embodies flawed aspirations for certainty and control but acknowledges its importance in granting legitimacy and social status to managers. I doubt that Czarniawska rejects certainty and control in those activities where they are necessary, such as aircraft safety procedures or supply chain logistics. None of us want our safety to depend upon spontaneous cooperation and we all want the supermarket shelves to be reliably replenished! Instead I believe that she is objecting to the extension of these modernist aspirations into other domains where, for example, knowledgeable workers are collaborating in a range of non-programmable activities. If we reject modernist ideals in such contexts, then we might expect management education to expose students to the full range of organisational theory, even if this makes them wiser but less optimistic about their ability to control events (Czarniawska 2003). But is this necessarily the case? If we reject conceptions of managerial practice rooted modernist ideals, then are the alternatives necessarily pessimistic? Implicit within my research questions is the assumption that each participant's learning experience brings about a change from an *original* to a *new* way of thinking about and enacting their employed roles. This mirrors a transformation in an individual's *meaning perspective* as discussed earlier in Chapter 2. From a post-structural perspective, all modes of thought and practice are necessarily based on discourses of one kind or another from amongst those which the participants have encountered. So, the next section reviews the dominant and alternative discourses on management in order to reveal what constitutes conventional

thinking, what forms new modes of practice might take and what challenges the latter might present to the former.

## **4.2 Management – frames of reference**

This section explores how the various managerial discourses are based on alternative assumptions about the nature of people, the nature of organisations, the nature and purpose of managerial work, and the underlying mindset through which the social world is perceived. It is organised around three sets of ideas starting with Watson's (2002) *systems-control thinking*, which represents the dominant discourse on management, then Watson's (2002) *process-relational perspective*, which encapsulates many aspects of alternative emerging discourses, and finally research studies which have attempted to reveal the 'real' nature of managerial work (e.g. Mintzberg, 1973; Hales, 1986; Watson and Harris, 1999).

### **4.2.1 Dominant frame of reference**

#### ***4.2.1.1 Systems-control thinking***

The dominant style of thinking in relation to organizations and managing within Anglo-American cultures has been characterized as *systems-control* thinking (Watson, 2002). This style of thinking views organizations as machine-like systems designed and controlled by knowledgeable experts (managers) in order to take numerous inputs (e.g. raw materials and human effort) and convert them into outputs, so that the organization can achieve the goals it was designed to fulfil. Systems-control thinking gives organisations the appearance of an objective existence often described as them being *reified* or *personified*. This is because it is underpinned by orthodox psychology derived from the French philosopher Descartes who in his famous phrase

“I think therefore I am” conceived the idea that the thinking mind can be separated from the body. This resulted in:

“...the Cartesian dualism that emphasises the separation between the individual, as an entity, and the individual’s social existence.” (Watson, 2002 p98)

This perspective encourages us to regard people as free-standing entities, able to split thinking from acting, planning from doing, and reason from emotion. Furthermore it invites us to regard an organisation as an entity separate from the people who are engaged in its activities. Once conceived as a thing in its own right, the organisation can be “understood to possess goals or objectives” and is often attributed with a single goal or several apparently uncontested ones (Watson, 2002 p58). These ideas combine to depict organisations as big social machines, and management is viewed as a design and control activity undertaken by expert managers who apply politically neutral knowledge and skills in order to achieve shared organizational goals rather than their own interests. This effectively de-personalises the ‘ends’ to which everyone’s efforts are directed thus masking potential conflicts of values.

Thinking about organisations as machine-like systems usefully supports a number of activities such as undertaking a high level profitability analysis based upon inputs and outputs. However, this mode of thinking conceals a variety of features which are of central importance to the practice of organising, managing and leading groups of people. For example it hides the intentions of the human beings working for and associated with the organisation, only some of which might overlap with the so called goals of the organisation. It also obscures the messy and unpredictable nature of innumerable interactions between people at work. Thus the systems-control view:

“...too easily leads to a forgetting of all the conflicts, arguments, debates, ambiguities and sheer guesswork that characterise the *processes* and *relationships* that what we might call ‘real’ managerial practice has to cope with all of the time.” (Watson, 2002 p58)

As a result systems-control thinking crucially overlooks *how* things happen within organisations and it conceals human interests, goals and values.

Systems-control thinking epitomises the original conception of management as a technical activity founded on the principle of control, involving the application of reason and scientific knowledge. Allegedly systems-control thinking informs a significant proportion of management education and thereby influences the way in which *managing* is perceived (Thomas, 2003). The attraction of this paradigm is that it allows managers to claim that they are morally neutral experts deploying *objectively rational means* to achieve pre-defined ends, with their authority legitimised by claims to rationality and science (MacIntyre, 1981). Objectively rational means are those where:

“...the techniques for achieving ends are determined in accordance with scientific knowledge.” (Brubaker, 1984 in Thomas, 2003, p27)

However, it is alleged that management knowledge has failed to produce any law like generalizations and has repeatedly demonstrated its inability to be effective in predictive terms thereby failing against the criteria for being *scientific* (MacIntyre, 1981). The simplifications inherent in the models deny the complexity of the human relationships which continually constitute the organization (ibid). Hence the *feasibility* of managerial control within organisations has been contested due to the “inherently uncontrollable nature of social relations” (MacIntyre, 1981 in Grey &

French 1996, p2), the delight people take in being unpredictable (Roberts, 1996), and the spread of information technology in complex modern work organizations (Stacey *et al* 2000). So if systems-control thinking is apparently attractive but flawed, what are its origins and why has it been so enduring?

#### **4.2.1.2 Modernism**

Management has its origins in the work of the Enlightenment philosophers and scientists from which emerged a set of ideas referred to as *modernism*, based on the key principle of:

“...’progress’ and control of human affairs through the application of reason and scientific knowledge to them.” (Watson, 2002 p44)

During the Industrial Revolution application of this principle resulted in management being conceived as a science based on an apparently objective and specialist body of knowledge. Central to this was an American engineer, Frederick Taylor (1856-1917), who developed *scientific management* which was intended to give managers (men) the means by which they could control the activities or workers (mainly men) in a manner similar to engineers controlling machines (Sheldrake, 2003). Taylor proposed that if managers used scientific techniques to devise the most efficient way of working, then the interests of the employee (financial reward) and the interests of the employer (maximum output for minimum input) could both be met. The manager’s job was to analyse tasks and then organise these activities and associated materials handling in the most efficient order. To maximise outputs the manager was required to deskill jobs, reduce learning time, exclude workers from decision making, monitor output and use financial incentives to control worker effort. Taylor’s thinking was rooted in traditional psychology in which dissection and analysis were the primary routes to understanding. His theories embodied a simplistic understanding of human

motivation and focused on the individual in the belief that the efficiency of the whole could be achieved by attending to its constituent parts.

Meanwhile in France, Henri Fayol (1841-1925) spent his later years documenting his approach to administration, outlined earlier, based on his experience as a successful managing director in the mining industry (Sheldrake, 2003). Fayol rejected the machine analogy, instead regarding organisations as living organisms and proposing that an effective manager required an understanding of management theory combined with personal integrity, judgement and leadership developed through practical experience (ibid). The self-funded scholar and social activist Mary Parker Follett (1868-1933) similarly rejected the machine-like view of organisations. Influenced by Gestalt psychology (founded in 1912) which embodied a holistic view of human behaviour and processes of integration, Follett was perhaps the first management theorist to think of an organisation as a whole, regarding it as a complex social entity in which efforts needed to be integrated towards a unity of purpose (Sheldrake, 2003). She believed that workers should contribute fully to their employing organisation to achieve identity and growth for themselves through their work group whilst delivering harmony, productive efficiency and commercial success for their organisation.

Despite the variety of thinking emerging from these founding scholars, Taylor's scientific management became the dominant perspective. In part this is due to the work of Lyndell Urwick, director of the International Management Institute, Geneva (1929-1934) who publicised the management theories developed by Taylor, Fayol and Follett in the US and the UK. Urwick was passionate about rationalisation and the turmoil and depression following the First World War gave him the context in which

to promote science and reason as an advantage for industrial society (Sheldrake, 2003). So despite initial resistance to scientific management in the UK, Urwick employed this model in his consulting practice during the inter-war years, arguing that it could deliver efficiency and prosperity (ibid).

#### **4.2.1.3 Credibility and expertise**

Many scholars now regard Taylor's *scientific management* as history yet empirical research undertaken since the 1970's has shown that scientific management still influences Western thinking about work generally and management specifically (Watson, 2003). One possible explanation is that the scientific origins of management thinking were subsequently reinforced by academics in the developing business schools in the late 20<sup>th</sup> century who sought credibility among their peers in both teaching and research (Grey *et al*, 1996). To achieve this they drew inspiration from the social sciences, which had already transferred methodologies for studying the physical world into the social domain. As a result business schools:

“...enthusiastically seized on and applied the scientific paradigm that applies criteria of precision, control, and testable models” (Bailey & Ford, 1996: p8 in Pfeffer and Fong, 2002: p2)

Just as business school scholars are alleged to have seized upon the scientific paradigm as a source of academic credibility, similarly it has been argued that the *official* discourse on management enables managers to claim expertise and hence legitimise their authority by making claims to science, rationality and objectivity (MacIntyre, 1981; Anthony, 1986). This link between science, rationality and managerial expertise is particularly interesting if we take into account the fact that the majority of managers in the UK and elsewhere in the world have been men (Collinson

and Hearn, 1996). Is the dominance of the scientific paradigm a function of a male preference for control and rationality?

In the UK, surveys conducted by the Chartered Management Institute (CMI, 2004 and 2005) found that in 2004 approximately 31% of people in managerial roles were women, compared with 7.9% in 1990 and virtually zero during the Industrial Revolution (Anthony, 1986). Evidence suggests that a large proportion of this growth has been at team leader level with women holding much lower percentages at the level of department head (26%), function head (17%) and director (13%) (CMI, 2004, 2005). Not only have most managers been men, but connections between managerial work and masculinity have also been identified (e.g. Collinson and Hearn, 1994, 1996, 2000; Kanter, 1977; Marshall, 1984, 1995; Schein, 1973, 1975; Sinclair, 1998; Wajcman, 1998). Two early studies in this area originated from the United States. Rosabeth Moss Kanter (1977) researched a large US corporation and argued that the managers (mostly men and a few women) were expected to be unemotional, efficient, objective, rational and fully committed to the organisation, concluding that their work was infused with a masculine ethic.

“Yet for most of the twentieth century a “masculine ethic” of rationality dominated the spirit of managerialism and gave the manager role its defining image. It told men how to be successful as men in the new organizational worlds of the twentieth century.” (Kanter, 1977, p25)

Schein (1973, 1975) used a 92-attribute inventory to characterize gender stereotypes which she called ‘men in general’ and ‘women in general’, asking managers to compare these attributes with their view of ‘successful middle managers’. Her research among managers in nine insurance companies in the US identified a

significant overlap between the perceived characteristics of a ‘successful middle manager’ and of ‘men in general’. This included characteristics such as competitive, self-confident, objective, analytical, logical, aggressive, ambitious and forceful. Conversely there was a much weaker overlap between the notions of ‘women in general’ and ‘successful middle managers’. The labels used by Schein such as ‘men in general’ and ‘women in general’ are crude stereotypes which were not intended to imply homogeneity among people who are biologically male or biologically female. However, Schein’s research deliberately compared social stereotypes and was therefore important in highlighting the significant overlap between two of these, namely ‘men in general’ and ‘successful middle managers’.

During the 1980s and 1990s managerial discourses continued to emphasise masculinity with sexual metaphors such as potent, penetrating and virile playing a key role in the description of top executives (Collinson and Hearn, 2000). During this period, Amanda Sinclair’s (1998) research revealed that the vast majority of organizational leaders in Australia were male, spoke English as their first language and lived in a nuclear family supported by a wife in stark contrast to increasing diversity within the workforce in terms of gender, cultural background, ethnicity, first language and family circumstances. She says:

“Until we unravel and expose the links between being a leader and enacting a particular form of manliness, then in gender and racial terms, leadership will remain the domain of a homogeneous elite.” (Sinclair, 1998 p175)

Australian organisations, Sinclair claimed, are clinging to an outdated concept of leadership, faith in which is strong but misplaced. Furthermore, the comparative

invisibility of women in corporate leadership has less to do with women than with the construct of leadership.

“Leadership is always the product of some collusion, whereby a band of supporters agrees that an individual, their leader, has what they need to lead them at a particular time...thus leadership and authority are constructed by audiences, by subordinates and superiors, by followers and peers.” (Sinclair, 1998 p16)

Regardless of women’s qualities and behaviours, colleagues were reluctant to regard these as ‘leadership’ due to a variety of psychological, cultural and historical factors.

In the same year, Judy Wajcman (1998) published her study of both male and female managers of similar seniority within five UK based high-technology multinational companies, all with equal opportunity policies. Wajcman claimed that male managers were treated as ‘the unremarkable norm’ and that any failure to achieve sex equality (in pay, or percentages holding senior posts) was regarded as a “problem in women” (Wajcman, 1998 p29). Furthermore, Wajcman (1998) found that senior managers, whether male or female, perceived sex differences in management style with the male style being described as directive, self-centred, decisive, aggressive, task-oriented while the female style of management was described as participative, collaborative, cooperative, people-oriented, caring, coaching style.

Each of the studies outlined above refer to the idea of masculinity yet the term itself is problematic. Notions of masculinity vary according to context and culture and are unreliable as descriptors of every person who is biologically male. Despite this, scholars have argued that within contemporary Western society, there is a shared notion of an *idealised form* of masculinity typically associated with conquests,

instrumental action and an urge to be in control together with characteristics such as adventurous, aggressive, authoritative, competitive, hard, independent, powerful, rational, strong and unemotional (Kerfoot and Knights, 1996; Marshall, 1984). In contrast *idealised forms* of femininity are more often associated with notions such as delicate, dependent, emotional, emphasizing relationships, generous, gentle, intuitive, loving, nurturing, responsive, soft, supportive (Marshall, 1984). However these descriptions of masculinity and femininity outlined above are stereotypes which mask the rich diversity within the human population. They are descriptions of constructed ideal forms rather than descriptions of reality. They are a reminder that socially constructed concepts such as masculinity, femininity, management and leadership all express interests and assumptions rather than providing accurate descriptions or evidence of the real world.

## **4.2.2 Alternative frames of reference**

### ***4.2.2.1 Process-relational perspective***

In an endeavour to develop a theoretical framework which will assist with the reality of managing in a modern work organisation, Watson (2002) has constructed the *process-relational* perspective on management and managing. This perspective avoids reification of the organization and instead features:

“...relationships, understandings and processes in which people are employed... to complete tasks in the organisation’s name” (Watson, 2002 p59).

Thus organizations are regarded as *social constructions*. This does not mean that they only exist in people’s minds, but rather that they are:

“...brought into existence or enacted through the ways in which those involved with them both think and act.” (Watson, 2002 p63)

In place of any pretence about the existence of unitary organisational goals, the *process-relational* perspective acknowledges the multiplicity of interests, goals and values which come into play when people attempt to undertake tasks in the name of their employing organisation. It is concerned with *how things happen in practice* when people come together in work organizations recognising that the managerial role is one of facilitator, co-ordinator and enabler rather than technician and designer, thus requiring managerial expertise to be in the social and political spheres. This conception of managerial work is associated with active verbs such as *organising* and *managing* to highlight its ongoing nature and that human relationships are constantly changing. Thus managing takes place in a messy, muddled, ambiguous, uncertain and contested world. Crucially this means that control is at best partial and productive co-operation is achieved as much through negotiation, persuasion, trading, exchange and manipulation as it is through rules and procedures.

The process-relational perspective describes human individuality as *emergent* and *relational*. By *emergent* Watson (2002) means that the individual is always in the process of becoming, meaning that people are continually working on their self-identity (individual's own notion of self) and negotiating their social-identity (notion others have of who the person is). By *relational* Watson means that we define ourselves in relation to others and that who we are cannot be separated from the processes in which we engage, many of which involve exchanging:

“...meaning-giving and emotional resources as well as material goods or necessities;” (Watson, 2002 p107)

Watson argues that these ideas are important to our understanding of management because they provide insight into the relationship between people and the

organisations in whose name they do work. Thus as well as exchanging effort for money, people are also involved in “broader projects in life” which impact their behaviour at work (Watson 2002, p106). Watson describes this as a *strategic exchange* between the emerging individual and their employing organisation. This understanding can inform the way managers negotiate and trade with people in order to achieve some balance between control, co-operation and commitment. The process-relational perspective does not use science as the basis for authority and expertise, instead acknowledging that managerial roles are both political and social. Authority is granted by followers based on the manager’s concern for the wellbeing and success of the community resulting in a relationship which echoes the discourse on leadership.

#### ***4.2.2.2 Mindsets –from scientific to social***

A comparison between systems-control thinking and the process-relational perspective, in Figure 7, reveals key differences on a number of theoretical dimensions. The process-relational perspective represents a coherent combination of contemporary social theory combined with advances in knowledge in specific disciplines such as psychology. Shifts away from modernism began in the late 1970s when French philosophers, such as Lyotard and Foucault, began to question modernism’s promise of progress via the application of science and reason, and other grand social theories such as Marxism, liberalism and Fascism. They rejected such universal truths and instead stressed the centrality of image and language in constructing a plural and fragmented reality. Thus postmodern social theory, typically attributed to Lyotard (1984), was born in which scepticism and plurality replaced certainty and unity.

**Figure 7 Comparison of systems-control and process-relational perspectives**

	<b>Systems-Control Thinking</b>	<b>Process-Relational Perspective</b>
<b>Understanding of organisations</b>	Machine like	Social construction
<b>The ends served</b>	Unitary goals	Multiplicity of interests and goals
<b>Understanding of humans</b>	Behaviourist psychology  (Agency located within individual who operates on external world; individuals motivated to fulfil wants and needs)	Relational psychology  (Agency located within relationships; individuals embedded within social situation and working on emergent identity)
<b>The means employed by managerial practitioners</b>	Technical, rational, design and control activity to achieve alignment between organisation ends and means	Social process, involving ongoing organising, shaping, exchanging, trading to achieve negotiated order
<b>The underlying paradigm</b>	Scientific	Post-structural

(Based on Watson, 2002)

This plurality can be seen within the multiplicity of interests and goals implicit within the process-relational conception of managerial work. Furthermore, the centrality of language in the construction of reality is consistent with the post-structural paradigm underpinning the process-relational perspective and hence its conception of organisations as social constructions. Recent developments in the field of psychology

are also in evidence within the process-relational perspective, and their significance merits a more detailed review.

#### **4.2.2.3 Agency – from individuals to relationships**

Scientific management is underpinned by *behaviourist psychology* in which the focus is on the actions and motivations of the individual (Stacey *et al*, 2000). There is a belief in the cause and effect relationship between the manager's actions and the workers behaviour and the manager is supposedly an objective observer, separate to the organisation (*ibid*). In the 1950's and 1960's the psychologists Herzberg and McGregor challenged this understanding of human nature which had hitherto been implicit within management theory and practice. In *The Motivation to Work* (1959) Herzberg and colleagues identified the difference between *hygiene* factors which generated dissatisfaction if they were not met (e.g. physical working conditions) and *motivators* which generated satisfaction if they were met (e.g. recognition of individual achievement, opportunity to exercise personal initiative). Consequently Herzberg criticised scientific management, arguing that it created uninteresting jobs and relied on financial rewards as a motivator. He was equally critical of Mayo's human relations approach arguing that 'sympathetic supervision' could not compensate people who were required to do dull jobs. Embedded within scientific management is an understanding of human psychology which regards individuals as naturally self-seeking, with a dislike for work and responsibility and responsive only to output based rewards. In *The Human Side of Enterprise* (1960) McGregor labelled this view of human nature Theory X, alleging that it was 'implicit in the bulk of contemporary management policy and practice' (Sheldrake, 2003 p164). He believed this represented a gross misunderstanding of human nature leading to the under development and utilisation of people's capabilities. In contrast he constructed

Theory Y in which individuals are viewed as positive, creative and willing contributors to the workplace providing they are able to fulfil their potential, equivalent to satisfying the highest need, self-actualisation, on Maslow's famous hierarchy of needs (Watson, 2003). This led McGregor to argue that the manager's task was to involve people in decisions, enrich job design, minimise monitoring and encourage the development of relationships among colleagues.

Maslow's (1954), Herzberg's (1959) and McGregor's (1960) theories are all described as *humanistic* because there is a focus on the connections between group relationships, group harmony and human motivation (Stacey *et al*, 2000). *Humanistic psychology* and *behaviourist psychology* both locate agency with the individual:

“...priority and primacy to the choosing individual over the social” (Stacey *et al*, 2000 p181).

In contrast Stacey (*et al*, 2000) has argued for a new way of thinking based on *relational psychology* in which agency is not located within individuals but within relationships. From this perspective, social interactions, primarily conversations and relationships, are the means by which people continually construct their individual and collective identities. These social interactions also involve the construction, rehearsal and re-construction of various discourses through which power relations between people are sustained or transformed. This line of thinking, consistent with the post-structural perspective outlined earlier, has been employed in the application of the complexity sciences to the field of management and leadership (Stacey *et al*, 2000; Shaw, 2002; Wheatley, 1999). From this perspective the manager is embedded within the organisation rather than operating on the organisation as if it were an independent entity. Rather than trying to understand the *organisation*, the focus is on *organising*,

this being an ongoing activity in which everyone is involved. The means of organising is through social interaction, primarily conversation

“We are arguing for a move away from understanding “the organisation” as a system ..... We are interested instead in understanding the process of organizing as the ongoing joint action of communication.” (Stacey *et al*, 2000 p187)

Watson’s (2002) process-relational perspective embodies this new way of thinking which is based on *relational psychology*.

#### **4.2.2.4 Means – from control to trust**

These developments in psychology have run in parallel with a succession of theories about how managers might ensure that people produce the outcomes associated with their employed roles in the most cost effective manner. Scientific management originally advised managers to dissect and organise tasks and control the workers, but Drucker’s (1954) concept of *management by objectives* shifted attention from tasks to outcomes, and suggested that self-control was more desirable than managerial control. Kanter (1983) subsequently recommended that managers think in terms of empowerment, innovation and an entrepreneurial spirit in order to enable US corporations re-gain their competitive edge. Consequently empowerment became a key topic for managers who were urged to foster holistic approaches rather than retain a segmentation of thought and action typically associated with bureaucratic structures (ibid). Meanwhile in the UK Handy (1985) advocated trust instead of control as the primary means through which management would be exercised. The literature on leadership has also largely eschewed notions of control in favour of achieving shared outcomes via other means including inspiration, commitment and trust (Bolden, 2004). Handy’s (1985) proposals were in response to economic and political events in the UK which resulted in high unemployment for many groups of people (e.g.

miners, automotive workers) while others endured the insecurity of frequent short-term appointments. Large organisations were increasingly replaced by smaller networked units and managers faced the challenge of managing people who derived little sense of community or identity from their role and who were often remote. The deployment of information technology accelerated downsizing and fragmentation leading to a growth in geographically dispersed 'virtual organisations' built upon outsourcing and teleworking. This trend coincided with developments in the field of psychology which shifted attention away from individuals to relationships. Handy's (1985) guiding principles on how trust could be employed included the establishment of small coherent groupings linked to clear goals, regular group meetings to help maintain relationships, and shared leadership with people taking responsibility rather than waiting passively for direction. This latter notion is now commonly referred to as dispersed leadership within the blossoming field of leadership studies (Bolden, 2004) which has played a significant role in shaping how people think about managerial work in recent years. Thus the recommended *means* of managerial work has progressed from control, to self-control, to empowerment and then trust, the latter becoming subsumed within the contemporary fashion for leadership as the preferred means of 'getting things done'. However, these are all examples of *normative theories* which seek to tell managers what they *should* be doing. What do the *descriptive theories*, arising from research tell us about what actually goes on in managerial work?

### 4.2.3 The 'real' nature of managerial work

#### 4.2.3.1 *Research studies*

Numerous research studies have attempted to uncover the *real* nature and purpose of managerial work. One of the earliest and most famous of these was undertaken in the US by Henry Mintzberg (1973) in which he observed a number of chief executives and managers (all men) doing their daily work during the 1960's and early 1970's. The findings depicted managerial work as an activity which included variety, brevity (an average of ten minutes per task except formal meetings), frequent verbal communication, fragmentation, a preference for current issues, acting within heavy constraints and an unrelenting pace (Mintzberg, 1973 in Thomas, 2003). Mintzberg (1973) also outlined the key roles which he observed managers performing including that of figurehead, monitor, disseminator, entrepreneur, disturbance handler, resource allocator and negotiator. As a result Mintzberg argued that the classical school of management (Fayol, 1916 / 1949) was of little relevance because it described managerial work in terms which were far removed from the reality which he believed he had observed. Mintzberg's criticisms of the classical school were strengthened when Kotter (1982) published his findings of research into the work of fifteen general managers, concluding that management was a 'seat-of-the-pants' activity rather than a rational analytical process and that the 'professional manager' did not exist. Such criticisms were further reinforced by Stewart (1983) who compared the 'traditional' view of management with her own findings from earlier studies of 160 managers (Stewart, 1967) alongside the research findings from Mintzberg (1973) and Kotter (1982). As a result the rational planner, the logical controller, the organised decision-maker of the 'traditional' view was replaced with a rushed politician embroiled in a

web of interpersonal relationships, engaging in frequent verbal communication and with little time to concentrate on anything (Stewart, 1983).

In a similar vein more recent research by Watson and Harris (1999) described the gap between textbook descriptions of management (plan, organise, co-ordinate, budget, control etc) and the lived reality of being a manager (bargaining, compromising, gossiping, influencing, persuading, opportunistic, political). As a way of explaining this, Watson (1999) suggested the need to distinguish between *management* as an outcome in the modern work organisation, *managers* as people formally employed to concentrate on management, and *managing* as a set of activities which bring about management. Using this conceptual trio Watson distinguished between *what* needs to be achieved (e.g. control resources) and *how* managers actually behave (e.g. negotiate, manoeuvre, and build relationships). This suggests that the apparent gap between the traditional view of management and the reality of managerial work as observed and reported by Stewart, Mintzberg and Kotter might have been nothing more than a conflation of the terms management (what) and managing (how) by these early researchers. What are we to make of these empirical studies and their challenge to the so called traditional view of managerial work originating from Fayol (1916/1949)?

#### ***4.2.3.2 The importance of ‘meaning’***

Thomas (2003) warns us to be wary of debates which position the real practice of managing in opposition to some classical conception of management. Based on Hales's (1986) review of twenty-five empirical studies of managerial work, Thomas concludes that while these studies reported the *observable* behaviours of managers, they failed to take into account how these behaviours would be interpreted by others

within the organizational context. All of the pre-1986 researchers appear to have made a significant mistake:

“By focusing on the surface features of managers’ behaviours at work they failed to consider the non-observable functions and responsibilities which lay behind it and which give it meaning.” (Thomas, 2003 p43)

In order to interpret the meaning of manager’s behaviours the researchers would need to relate their findings to a theoretical framework, such as Fayol’s or any other they might choose. However, this was missing from their analysis hence Hales (1986) concluded that none of these studies were a suitable basis for commenting on the validity of the classical conception of management.

A subsequent study in the US (Carroll and Gillen, 1987) asked managers to describe not only what they were doing, but why and to what management function they thought they were contributing. This demonstrated that managers who pay more attention to classical management categories such as planning, organising, commanding, co-ordinating and controlling, “tend to produce better unit and organizational results” (Carroll and Gillen, 1987 in Thomas 2003, p43). Thus Thomas concludes that:

“The classical and empirical accounts of the means of management begin to look not so different after all.” (Thomas, 2003 p44)

This quotation appears to take us full circle so what does this mean? Firstly it is clear that complex social constructions such as *management* require the careful use of language if meaningful comparisons and to be made and valid conclusions drawn. Watson’s (2002) conceptual trio of *management*, *managers* and *managing* provides some help in this regard, partially explaining the reported gap between the observed

activity of managing (e.g. persuading, motivating, manipulating, trading) and the desired outcomes of management (e.g. co-ordination of staff). Secondly, the review undertaken by Hales (1986) illuminates the weaknesses in the early empirical studies by drawing our attention to the *meaning* which people attribute to manager's actions based on the context in which the actions take place. For example, if a large organisation adopts a project based approach for major change programmes, then project management becomes an institutional practice providing a theoretical framework in which managerial actions are located. Thus each project manager is granted the right to manage these people according to a set of procedures embodied within the project management methodology. A project manager's actions in this context will have a particular meaning whereas the same actions in a different organisation, say a University unfamiliar with project management, will perhaps cause mild amusement or even bewilderment.

Thirdly it is important to remember that Fayol's managerial theories were largely based on his experience as an engineer (1860 to 1888) and then Managing Director (1888 to 1918) of a mining and metallurgical organisation in France. Perhaps 19<sup>th</sup> century mining and steel production required heavily controlled processes and highly organised workforces involving relatively unsophisticated workers who were inexperienced in industrial enterprises? The people researched by Mintzberg (American chief executives and managers), Kotter (American general managers), and Stewart (British managers and administrators) in the late 20<sup>th</sup> century were operating in very different social, cultural, economic and technological contexts compared to the Managing Director of a late 19<sup>th</sup> century French mining and steel making company. My point is that context will influence what managers need to do, and what their

actions will mean to others. Finally, we saw earlier how language does not provide an accurate representation of reality in the same way that a photograph might provide an accurate picture of a landscape. Hence the empirical studies reporting the observable behaviours of managers provide us, metaphorically speaking, with the equivalent of a pencil sketch of a lively social event such as a carnival. The drawing captures the positions, facial expressions and costumes of each person but cannot possibly convey the smells, the heat, the competition between dancers and the social symbolism (perhaps fertility) of the occasion. Thus if the social and cultural context is not taken into account and the meaning of the activities depicted in the drawing is not explained then the 'real' story is not told. These omissions prevent the observer from conveying a full understanding what they are seeing. Hence the empirical studies undertaken by Mintzberg (1973), Kotter (1982) and Stewart (1983) were fundamentally flawed because they failed to take into account the full range of factors which combine to construct *management* in any given context. All three researchers focused on *what practitioners do* and compared these with *the means management practitioners are supposed to employ* without taking into account who the practitioners are, how the practitioners think, what meaning others attribute to their actions, the organisational context, the social and cultural context, the economic and technological context, and the theoretical framework in which these actions took place.

#### ***4.2.3.3 Discourses and components***

Drawing on the literature review so far, Figure 8 on the following page presents a summary of the numerous components which comprise competing discourses on management. This includes *theories* about practice, contrasted earlier in Figure 7 plus contrasting factors about *practitioners*, *practice* and the *context* in which it take place.

**Figure 8 Discourses on management - key components****Factors relating to management practice:**

- Who practitioners\* are (personality, characteristics, skills, gender, ethnicity etc)
- What practitioners do
- How practitioners think
- What meaning others attribute to the practitioner's actions
- The relationship between the practitioner and the other people involved
- The organisational context – hence the organising principles which operate such as structure, norms and sources of authority
- The social and cultural context - including values and assumptions such as those relating to definitions of prosperity and success
- The economic and technological context - including competition, levels of employment, geographic spread of workforces, modes of communication

**Factors embedded within management theories:**

- Understanding of organisations – machine, system, organism, relational process
- Understanding of humans – theories of psychology (behaviourist, humanist, cognitivist, relational) and the implications for understanding human nature, human motivation, group behaviour and the location of agency
- The ends (outcomes, interests) management practitioners are supposed to serve
- The means management practitioners are supposed to employ
- The underlying methodology - the extent to which the practitioner is regarded as objective and separate from the organisation or subjective and embedded

(\*Practitioner = manager, leader, or anyone else who is responsible for organising and motivating groups of people to achieve shared outcomes in the name of a particular employing organisation)

Systems-control thinking (*scientific management*) was originally enacted by men, in the late 19<sup>th</sup> century, in an industrial organisational context, involving inexperienced and subservient workers, whose social and economic context was such that they probably respected authority and primarily wanted a good wage. In contrast, the process-relational perspective, if enacted today, might be practiced by men or women, in a variety of organisational contexts (industrial, service, education, health etc), involving educated and thoughtful workers, whose social and economic context is such that they are suspicious of authority and seek personal development and fulfilment as much as a good wage. Thus the differences between systems-control thinking and the process-relational perspective are evident at both a theoretical and practical level. However, what is really interesting here is that both discourses pay very little attention to one of the key *practical* factors in Figure 8, namely *who the managers are* in terms of their age, ethnicity, nationality or gender.

Gender, is known to influence how managers are perceived by their colleagues with men and women experiencing differential responses when engaging in similar behaviour (Fletcher, 2004). Collinson and Hearn (2000) have bemoaned the failure of many research studies and textbook theories to consider the gender of the manager or to mention the fact that the majority of the people being talked about are men. As a female manager I am particularly intrigued by this omission. I am also intrigued by the apparent contradiction between the expressed desire for more feminine approaches to management and the slow progress towards gender equality in senior managerial positions in the UK (Guardian, 2007). These issues matter to my research because if my research subjects enact their roles in a different way as a result of their learning, then the consequences which they experience could be influenced by their gender

(Fletcher, 2004). Equally, if changes in their practice are perceived as a shift in gender, say a masculine to a feminine management style (Wajcman, 1998), then this could also make a difference how their colleagues react.

### **4.3 Management – gender matters**

In the US and UK several (female) scholars have blamed a masculine approach to managerial work for some of the problems which have emerged within organisations in the late 20<sup>th</sup> century (e.g. Miller, 1986; Kanter, 1989; Simpson, 2006; Wheatley, 1999). More recently it has been suggested that there may be connections between un-moderated masculine behaviour and recent corporate failures, excessive risk taking and the global financial crisis. Over twenty years ago Jean Baker Miller, a qualified doctor (psychiatrist and psychoanalyst) and academic in the field of women's psychology highlighted these issues and predicted change:

“Practically everyone now bemoans Western man's sense of alienation, lack of community, and inability to find ways of organizing society for human ends. We have reached the end of the road that is built on the set of traits held out for male identity...” (Miller, J., 1986 p88-89).

As a solution Miller (1986) argued that leadership based on female values such as inclusion and connection is needed to address troubles in fields such as business, politics, medicine and the law, and she is not alone. Corporate scandals, business failures, and problems with global financial markets alongside the emergence of flexible, networked, information rich organisations in the early 21<sup>st</sup> century, have led a growing number of scholars (male and female) to argue that the new millennium requires a new style of management (e.g. Alvesson, 1998; Hendry, 2006; Kanter, 1989; Lee, 1994; Wajcman, 1998; Wheatley, 1999). Many have described this new style as participative, cooperative, softer, qualitative and people-oriented, attending to

relationships and responsive to others (Alvesson, 1998; Kanter, 1989; Lee, 1994; Wajcman, 1998; Wheatley, 1999). In some instances, this new management style has been explicitly linked to skills which are culturally associated with femininity. For example:

“...in its report *Management Development to the Millennium*, the British Institute of Management (1994) argues that ‘female ways of managing will be more appropriate in the millennium’. In future, they say...‘feminine’ skills of communication and collaboration will come to the fore.” (Wajcman, 1998 p57)

Similarly, employers worldwide have been calling for management education to place more emphasis on the development of interpersonal skills such as communication, collaboration, team-working, people management and the like. For example, a survey in 2005 of 508 employers of MBA graduates from around the world, found that soft skills such as interpersonal behaviour and leadership were regarded as more important than finance abilities, academic success and knowledge of IT (TopMBA, 2005).

Within the UK, researchers working in collaboration with the Windsor Leadership Trust invited over one hundred experienced leaders from all sectors of UK society to express their views about how leadership would need to adapt to changes in society (Bolden and Gosling, 2003). Many of the leaders saw as a need for a more participative leadership style involving qualities such as openness, empathy, integrity, self-awareness, humility, emotional engagement, adaptability, resilience and judgement. The research report made no comment on the validity of these perceived needs or the extent to which the participants might simply have been repeating emerging discourses on leadership to which they had been exposed in recent books and other publications.

### 4.3.1 Female advantage?

Research findings and publications such as those outlined above are aligned with the so-called *female advantage discourse* which claims that a *female style* will become the new norm for a successful manager.

“What business needs now is exactly what women are able to provide, and at the very time when women are surging into the workforce.” (Helgesen, 1995 p39)

During research into several successful senior women in the US, Sally Helgesen (1995) observed them focusing their attention on inclusion, connection, affiliation, communication, empowerment and human development rather than status, authority and autonomy. She argued that the changing nature of the workplace required leaders who could “stimulate employees to work with zest and spirit” and ‘encourage and nurture human growth’ (Helgesen, 1995 p235). So, while earlier studies focused on discrediting the idea that women lacked key managerial skills when compared to men (e.g. Marshall, 1984), the early 1990’s saw the emergence of a different debate. In this debate it was argued that women had an advantage and were making it into senior managerial roles, not by copying men but by using their so called feminine approach involving participation, power sharing, and a range of people-centred interpersonal skills (Helgesen, 1995; Rosener, 1990). If this argument is valid, then more women should have made it into top leadership and management positions in the late 20<sup>th</sup> and early 21<sup>st</sup> century. Is this the case? The answer would appear to be ‘no’. For example, in March 2007 the Guardian published a report showing the percentage of women in various senior positions and outside of the voluntary and health sector, the data (summarised in Figure 9) shows that a very low percentage of posts held by women.

**Figure 9 Senior posts - percentage held by women (2007)**

	% who are women
Voluntary organisation chief executives	46%
Health service chief executives	40%
Senior civil servants (DG level and above)	22%
Local authority chief executives	21%
Female council leaders	18%
Large company directors	10%

(Source: Guardian “The Gender Agenda” 21/3/07)

In July 2007 the Equal Opportunities Commission published their final report before being absorbed into the new Commission for Equality and Human Rights. This report (summarised in Figure 10) warned that sex equality is still generations away:

**Figure 10 Senior posts - number of years to gender equality (2007)**

<u>Posts held by women</u>	<u>Number of years to reach equality</u>
20% of MPs	195 years
10% of FTSE 100 Directors	65 years
9% of high court and senior judges	60 years
15% of council leaders	Never, unless action stepped up

(Source: Equal Opportunities Commission, 24/7/07)

Explanations for figures such as these often refer to the *glass ceiling*, the time taken for women ‘in the pipeline’ to get to the top, or the high proportion of capable women who prefer to leave organizations to start their own business. Explanations such as these are interesting and in some cases accurate but they divert attention away from the cultural factors which affect women in leadership roles. Research indicates that senior women have to continually negotiate to secure respect and assert their authority, that they lack positive role models, that they are likely to be judged more harshly than men and that they do not receive support from more senior women (Marshall, 1984). Many women ‘do leadership differently’ but find that their skills and achievements are not noticed and rewarded (Sinclair, 1998). Why is this? Two researchers who offer well informed responses to this puzzle are Judi Marshall (1984) and Joyce Fletcher (1999). Their research and arguments are reviewed in the following sections.

#### **4.3.2 Women managers**

Judi Marshall’s (1984) research focused on the experiences of thirty female managers in middle to Board level positions within the book publishing and retailing sectors. Marshall concluded that the female managers were being evaluated against an *effective manager* norm based on male behaviour and as a result faced a double-bind. If they failed to match this norm then they were not regarded as effective, and if they acted in accordance with the norm then they were punished by their colleagues for deviating too far from displays of femininity. This meant that they felt they had to make a difficult choice between adopting what they regarded as male tactics described as control, competition, aggression, political games and paying attention to appearances, and their own natural woman-centred style which focused on personal relationships, cooperation, honesty, understanding and authenticity.

Marshall also found that people responded differently to female and male managers, even when they displayed the same behaviour. For example many felt that when a female manager expressed anger she was judged as too emotional while the same behaviour by a man was regarded as 'just letting off steam'. Since the publication of Marshall's research in 1984 and earlier studies on gender in the late 1970s one might have hoped that researchers would have taken these findings into account. However, the majority of research studies, articles and textbooks relating to management, fail to identify the gender of the manager or to mention the fact that the majority of the people being talked about are men (Collinson & Hearn, 2000). This appears to be a major weakness in much of the contemporary literature on both management and management education.

“To summarize, whether we refer to the ideal prescriptive models of management of early academic writers, descriptive accounts of managerial work or even more critical analyses, the masculine imagery of management and managers seems to be taken for granted, neglected and thereby reproduced and reinforced (Collinson and Hearn, 2000, p266)

So the interesting question is why? Why does the literature on management and management education continue to promote masculine imagery yet fail to take into account the gender of the practitioner? A simple conclusion might be that the majority of writers, men, are writing for the majority of the target audience, male scholars and male managers! However, following Marshall (1984), if one takes a sociological point of view then it is possible to see more subtle forces are at work to create and sustain male dominance within these discourses and within wider society.

### 4.3.3 Man made language

Dale Spender's (1998) *Man Made Language*, first published in 1980 has become one of the classic texts associated with the women's movement. I am nervous of being associated with such radical feminism as I risk alienating some of the audience for my own writing, most of whom are likely to be men! However, inspired by the belief that Spender's book rests on a foundation of robust evidence and argument rather than on prejudice, I intend to continue!

Spender (1998) illuminates the process through which men have been responsible for *naming* the vast majority of objects, events, concepts, categories and feelings within the world, and they have done so in a manner which reflects their experiences and their interests. As a result, she argues, the English language provides us with only a partial understanding, a male understanding, of numerous phenomena. However, Spender does not blame men for this, but instead regards it as a consequence of access to education, historically the preserve of a minority of the UK population – typically white males with access to wealth or other privileges. Hence a minority of men have had significant influence over the written word as a result of which:

“English is biased in favour of the male in both syntax and semantics” (Schneider and Foss, 1977 p1 in Spender, 1998 p14)

Here syntax refers to sentence structure and semantics refers to meanings available within the language (Spender, 1998). In the UK both sexes have inherited these patriarchal norms and patterns of thought having been socialised into Western discourses from birth. As a result we have a shared *tunnel vision* which can only be overcome by consciousness-raising *for both men and women*. The problem is that this challenges men's supremacy within certain social arenas. Echoing the first section of

this literature review, Spender (1998) acknowledges that humans are obliged to *name* the various elements of our world so that we can attach meaning to them and thereby establish some sense of order. However, she argues that this naming process is political in that it reflects the interests of those doing the naming. As a result there is a patterning of the English language in which male is regarded as positive and female is regarded as inferior. For example, male qualities such as strong, rational are associated with cultural norms of what is 'good' whereas female qualities such as yielding, emotional are deemed 'bad' (Spender, 1998). Examples can be found within the English language such as certain pairs of words where the female form, and hence women's roles, have been devalued via the attachment of derogatory meanings. This includes words such as Bachelor and Spinster, Baronet and Dame, Sir and Madam, Master and Mistress, King and Queen. In the case of Bachelor and Spinster this unmarried role in society is regarded as positive for men but negative for women. Similarly the female words Dame, Madam, Mistress and Queen have all acquired sexual connotations of various sorts, yet the male equivalents remain free of such contamination. Where women succeed in securing roles which were previously the preserve of men then it has become common practice to 'mark' them as different, for example referring to them as a *lady* doctor, a *female* surgeon or a *woman* lawyer, implying that the original terms (doctor, surgeon, lawyer) necessarily meant male. Similarly, perhaps to protect men from loss of status when associated with occupations regarded as female, titles such as *male* nurse are used.

Not only have men dominated the development of the English language, they have also dominated the construction of knowledge as they have been the researchers, the research subjects and the publishing editors in the majority of the major disciplines to

date. To illustrate this point Spender (1998) cites research undertaken by Witkin *et al* (1962) in which experiments were conducted to establish whether there were sex differences in the way males and females perceived a stimulus in a surrounding field. The researchers found that females were more likely to see the stimulus and surrounding field as a whole, while males saw the stimulus and field separately. Witkin (a man) named these findings, describing the behaviour of the males as *field independence* and describing the behaviour of the females as *field dependence* (Spender, 1998). Hence Witkin allocated terms which were *male positive* and *female inferior*. Spender (1998) suggested that Witkin's naming bias could be exposed and reversed by allocating different names to these findings, such as *context awareness* for the female research subjects and *context blindness* for the males. This is one very specific example, but Spender (1998) argues that it is part of a historical trend. In sociology in the early 1970s, female scholars began to expose how the discipline was based almost entirely on research into male activities and problems. Historically, sociologists have rarely studied areas of work which involve women, and as a specific example, there were apparently no studies into female redundancy in the workplace prior to 1980. Similarly in psychology, the research subjects have historically been male and the research topics have largely originated from men's experiences and perspectives. By omitting to study women's roles in many aspects of life, a minority of men have given birth to a language and to bodies of knowledge which are heavily slanted towards male interests and concerns.

How do these arguments relate to the field of management? With rare exceptions such as Mary Parker Follett, historical writings on management have expressed men's views, needs, interests and perspectives and have reported on men's experiences.

Although still in a minority, influential female scholars such as Rosabeth Moss Kanter, Margaret Wheatley, Judi Marshall, Judy Wajcman and Linda Perriton have begun to redress this balance. However, the persistence of the patriarchal discourses is perhaps not surprising given that fundamental change would challenge men's dominant position in society.

“From the power base of patriarchy, men claim the right to construe public meanings. In exercising this ‘right’ they have, and do, impose their values and standards, based firmly in their experiences, on society as a whole.” (Marshall, 1984 p50)

What is puzzling is that both men and women are among those who have been suggesting that a management style which embodies skills and behaviours culturally associated with femininity is needed for today's flexible, networked, information rich organisations (e.g. Alvesson, 1998; Kanter, 1989; Lee, 1994; Wajcman, 1998; Wheatley, 1999). Furthermore, there has been a rush to associate so-called *feminine* behaviours such as openness, empathy, self-awareness, humility and emotional engagement with contemporary notions of ‘good’ management and leadership.

#### **4.3.4 Paradox of post-heroic leadership**

So, why have these new forms of practice not become the new norm and why have women not benefited from this apparent re-definition of a successful manager? Joyce Fletcher provides a very insightful explanation of this puzzle. During the last ten years, Fletcher (1999, 2004) has argued that women have skills and behaviours which are a good fit with the style of leadership said to be required in contemporary work organizations, but that these skills and behaviours are not recognized and rewarded because our society is dominated by a masculine *logic of effectiveness*. This is a logic which rewards autonomy, individual achievement, independence and technical

competence. Fletcher therefore critiques the so called *female advantage* discourse and instead refers to the ‘paradox of post-heroic leadership’ to describe this situation. Fletcher (2004) uses the phrase *post-heroic leadership* to describe the collaborative, mutual, non-hierarchical, relational approach to leadership said to be required in today’s organisations. In place of the individual hero, post-heroic leadership is collective, mutual and distributed, accomplished by many people working at different levels throughout the organisation. Instead of hierarchical command and control interactions, post-heroic leadership is a social process occurring through human relationships and interactions, requiring those with positional authority to be less competitive and more open to ‘being led’ by others. Thus post-heroic leadership requires a paradigm shift from independence and ‘power over’ to interdependence and ‘power with’. Rather than providing solutions for others to implement, post-heroic leaders create conditions in which learning and growth occur both for the people involved and for the organisation.

“Achieving the transformational outcomes of post heroic leadership requires putting into practice a set of beliefs and principles, indeed a different mental model of how to exercise power and how to achieve workplace success and effectiveness.” (Fletcher, 2004 p654)

However, Joyce Fletcher’s research (1999) indicates that relational behaviours such as interdependence, enabling others, and maintaining relationships are misinterpreted as needing to be liked and emotional dependence. Furthermore, Fletcher claims that the words used to describe this type of practice such as nurturing, vulnerability, community, collaboration and empathy, are coded as ‘feminine’ and thereby devalued in the workplace. Hence she argues that post-heroic leadership is not recognized in many Western work organizations because it violates the dominant, masculine, logic

of effectiveness. Thus, there is a significant risk that practitioners primarily employing relational skills will not be recognized and rewarded for what they do.

“...there is a dynamic process involved in which relational practice “gets disappeared” as work and gets constructed as something other than work.”

(Fletcher, 1999, p103)

In reaching this conclusion, Joyce Fletcher’s (1999) research draws heavily on the work of Jean Baker Miller (1986) and the psychologists and psychiatrists at the Stone Center at Wellesley College. Miller (1986) argued that male society, and hence the majority of work, has been structured in a manner which recognises male skills and modes of being within the *public sphere*. Over time women have been required to attend to the relational aspects of life most often associated with developing and encouraging others, in the *private sphere*, rather than self-enhancement and achievement. Dominant psychological discourses, developed largely by men and about men, are therefore rooted in public sphere characteristics such as separation, individuation and independence. In contrast relational psychology is rooted in private sphere characteristics such as connection, interdependence, collectivity and ‘growth in connection’ (Miller, 1986; Fletcher, 1999). Crucially early socialisation requires men to deny their relational skills as a bias towards connection is regarded as weakness, hence men rely on women to carry these skills and roles for them.

“Thus, society assigns relational activity to women and views it as “women’s work”. (Fletcher, 1999 p32)

Moreover, skills associated with the private sphere such as developing others and fostering relationships, are seen as skills which occur naturally whereas skills associated with the public sphere, historically dominated by men, are seen as the result of education and development. Thus:

“...male society recognises as activity only what men do. And, if women somehow manage to do what men do, they are strongly, even violently opposed.....Most so-called women’s work is not recognized as real activity.”

(Miller, 1986 p53)

So despite apparent agreement on the need for new styles of management and leadership within contemporary organisations, and hence the so-called *female advantage*, Joyce Fletcher skilfully surfaces the gender related factors which play a subtle role in devaluing post-heroic practitioners.

To compound the problem, Fletcher suggests that males and females enacting post-heroic leadership are likely to experience differential responses (Fletcher, 2004). Men are more likely to be recognised as ‘doing participative leadership’ and if this is effective then colleagues are likely to reciprocate so that leadership practices become more mutual, power relations more fluid and interactions less competitive. However, women enacting a post-heroic leadership risk being seen as not ‘doing leadership’ at all because their actions are associated with invisible ‘labours of love’ to which attention is rarely called. As a consequence their behaviour is not recognised as leadership and their invitation to reciprocate (i.e. share power, develop interdependent relationships) is not taken up by colleagues who mistakenly read their behaviour as selfless giving. Hence:

“In other words, when women use their relational skills to lead, their behaviour is likely to be conflated not only with femininity but with selfless giving and motherhood.” (Fletcher, 2004 p653)

Fletcher’s analysis offers a robust explanation of the painfully slow progress towards numeric sex equality in senior leadership positions. However, this is not all. Fletcher warns that while post-heroic leadership promises business success and transformation,

these will not be realised if individuals develop relational interdependent behaviours and skills *without* equivalent changes in structures and underlying belief systems throughout their organisations. If the underlying logic of effectiveness remains intact such that individual achievement and existing (male) norms continue to dominate ideas about what constitutes a ‘successful manager’, then the only change will be the addition of a few more ‘participative’ behaviours into the competency list.

How does this relate to my research? The research sites have been chosen as ones which involve *learning to change the game*. If we make the pragmatic assumption that the new game is one more suited to contemporary needs then this will involve a more relational, participative, collaborative management style as discussed in this section. However, Joyce Fletcher has revealed the potential issues which may arise for both men and women who choose to enact this post-heroic approach, with women facing even more challenges than men. These insights will hopefully provide valuable resources for the interpretation of my research findings.

## 5 PHILOSOPHY & METHODOLOGY

This chapter provides a thorough account of how the empirical research was conducted, the challenges which emerged and how these were addressed. Some of these challenges originated from the complex task of researching people's perceptions and experiences, which raised questions about how these could be known. Additional challenges emerged as a result of learning the researcher's craft in parallel with other demanding commitments including a full-time job and a young family. These issues all played a part in the decisions made and the elapsed timeframe for the research.

My overriding aim is to present an honest account of my research. Therefore I wish to emphasise that I began my empirical research *prior* to working through my entire research strategy. I developed a research proposal in 2004 which included a brief literature review plus outline research questions and identification of research sites. However, rather than developing this into a master plan, I developed a set of themes which I wanted to discuss with my research subjects and began the empirical research. In parallel I continued to review relevant literature including texts on social science research to further develop my thinking and skills in relation to the fieldwork and analysis of outcomes. Hence I have consistently worked from the practical back to the conceptual and theoretical. Therefore, early sections of this chapter are structured in the same way, working from practical questions (e.g. how to gain knowledge about my research subjects' experiences) back to conceptual questions (e.g. did my approach sit comfortably with my worldview). In order to provide a well-informed foundation for my emerging skills as a researcher, I have drawn on the literature from a range of social science disciplines including Organisational Behaviour (Burrell, Morgan, Johnson), Education (Guba, Huberman, Lincoln, Miles), Sociology

(Gubrium, Holstein, Mason), and Management (Alvesson, Easterby-Smith, Gill, Watson). This breadth of sources also acknowledges that my research is located at the intersection of these disciplines.

## 5.1 Research strategy – puzzles and paradigms

Meeting the goals of the study outlined at the end of Chapter 2, required thorough consideration to the type of data required to address the research questions and how such data might be generated. Having selected the research sites I wanted to understand whether these programmes influenced the managers' practice and if so, in what ways. For example, how did each research subject approach their role and did this differ from their approach prior to participating in their chosen programme? I also wanted to know something about their emotional responses both during their learning experiences and also as they transferred their learning into the workplace. I had made an early decision to embark on a series of **semi-structured interviews** with the research subjects. As the research project progressed, I realised that my enthusiastic curiosity overlooked profound questions relating to knowledge and my own assumptions and orientations as a researcher. The problem was how could I *know* how the programme participants thought about their role? How could I *know* what they were thinking, what models or concepts they were employing when they engaged in the practical activity of managing? How could I find out about their emotional responses during and after their learning experiences? Why did I believe that semi-structured interviews were the most suitable approach and what would I do with the outputs?

The research questions related to intangible and in some cases unobservable *social phenomena* such as thoughts, concepts, emotions and social interactions comprising

the activity of managing which could not be *known* in an objective sense. Similarly, it was not possible to *know* in an objective sense whether or how the subjects had changed their practice. However, it was possible to *know* how the research subjects interpreted and made sense of their practice and their learning experiences, by inviting them to talk about these. This would result in the learner's account, in their words, of how they were approaching their working role and whether this differed from how they approached it prior to their Masters programme. Similarly the research subjects could be invited to describe the emotions they experienced both during the learning process and back at work. However, when the subjects described their thoughts, emotions, social interactions and the way they understood their role, would these descriptions constitute *authentic and objective accounts* of these phenomena? Or, would they be selective accounts given on a particular day, using a discourse which they thought fit for the occasion and influenced by the questions asked and their relationship with the researcher? These questions highlighted the need for serious thinking about social phenomena and about the nature of the knowledge which might emerge from this type of research.

Social science researchers are urged to explore their basic beliefs about human beings and the social world, in order to articulate the assumptions which they bring into the research process (Burrell & Morgan, 1979; Easterby-Smith, 1991; Guba & Lincoln, 1994; Mason, 2002; Morgan, 1983; Watson, 1994 ). These assumptions affect the way each individual sees and interprets the world, including the social world, thereby influencing how they shape, execute and interpret social science research. An **inquiry paradigm** expresses a researcher's beliefs and assumptions about the world and about how knowledge of that world can be known. It is expressed through a researcher's

ontology, epistemology and methodology and these must be coherent for any given research project (Guba and Lincoln, 1994). If someone expresses their beliefs and assumptions about the very nature and essences of phenomena in the world then they are expressing their *ontology* (Mason 2002). If they express their understanding about how these phenomena can be known and how knowledge of them can be demonstrated then they are expressing their *epistemology* (ibid). Methodology is a combination of the strategy by which a researcher seeks to answer their research questions and the specific investigative techniques (methods), such as questionnaires or interviews, which they employ (ibid). What was my inquiry paradigm and how had this been expressed through the choices which I had already made and the assumptions which I had brought into the research process?

### **5.1.1 Ontology**

#### ***5.1.1.1 Social phenomena***

My research was focused on intangible and in some cases unobservable *social phenomena* such as thoughts, concepts, emotions and social interactions comprising the daily activity of managing. I was interested in practicing managers' accounts of how these social phenomena were influenced and possibly changed by their participation in a particular form of management education. Was I looking for cause and effect? What about the myriad of other factors which might have shaped and still be shaping the way my research subjects experienced these social phenomena? What about other factors which might influence how the research subjects portrayed their thoughts and emotions to me? As a physics graduate, I knew that research of the physical world was much more straightforward. With the exception of sub-atomic particles, the physical world is understood to be objective, tangible and concrete,

measured through objective method, driven by natural laws, existing outside of the consciousness of individuals and independent of how people make sense of it (Guba and Lincoln, 1994; Easterby-Smith, 1991; Watson, 2003). Natural science researchers aim to measure and analyse the causal relationship between variables, some of which can be controlled, in a value free framework, thus positioning themselves as objective observers of entities or phenomena, which are not altered by the research process (ibid). Hence, natural science research is dominated by the scientific method which emphasizes objectivity, measurement, neutrality and validity, adopting what is known as a *positivist* ontology (Guba and Lincoln, 1994).

Historically, much research in the social sciences has been modelled on the more mature natural science disciplines (ibid). However, this research did not relate to objective, tangible phenomena which could be measured in any way, so the natural science approach was inappropriate. Phenomena such as emotions, thoughts and concepts are *intangible, unobservable* and *not measurable* so any knowledge of these is via the language employed by the research subjects. Other phenomena, such as social interactions are *observable* but any account of these is shaped by the researcher's own perspective, language and interpretation. In recent years social science research paradigms have matured and migrated away from their natural science origins such that it is now possible to do a *credible* piece of social science research whilst holding the view that language acts to construct many ontological elements of social reality. This is not to deny the existence of objective phenomena in the social world and neither does it reject or discredit the scientific research paradigm. For example, in a study of childbearing the collection of objective data on the number of children per female and the average age of the mother when the first child was born

would still be valid. However, if the researcher is interested in the emotions experienced by women during childbirth, then it is problematic to think in terms of these being objectively evidenced and measured through scientific method.

The development of social science research paradigms is associated with broader *paradigm shifts* in society (Kuhn, 1970) inspired by numerous philosophers including the influential German philosopher Edmund Husserl who argued that the social world and social reality:

“...are not objective and exterior, but that they are socially constructed and given meaning by people.” (Husserl 1946, in Easterby-Smith 1991, p24)

Hence in recent years, many social science researchers prefer to take the view that our understanding of social reality and our use of language are necessarily interdependent (Alvesson, 1996), as discussed earlier in Chapter 2. To illustrate this point, consider leadership which can be named as a phenomenon but which cannot be assumed to be a *stable object* in the world of organisations (Alvesson & Deetz, 2000). The problem with this phenomenon, and others like it, is that attempts to understand it end up referring to multiple ontological elements of social reality such as the skills and attributes of people (Stogdill, 1974), processes (Vanderslice, 1988) or relationships between people (Wood, 2005). Thus our understanding of the social phenomenon which we call *leadership* is constructed via our perspective and our language. It follows that the way a social science researcher perceives the social world will necessarily influence the way they shape, execute and interpret their research:

“...the researcher is part of a socially constructed world and can hardly adapt a neutral position to that which one is studying.” (Alvesson 1996, p459)

Hence the researcher will influence the findings which they produce and the reader must be able to take the researcher's influence into account (Watson, 1994).

### ***5.1.1.2 The researcher's influence***

This research project originated from my curiosity about transformative management learning, in which participants are enabled to surface, review and possibly revise their core beliefs, values, assumptions and goal orientations relating to 'being a manager'. The parallels with undertaking social science research are striking and somewhat ironic. Here in this chapter, good practice demands that I surface, review, revise (possibly), and share the ontological, epistemological and methodological orientations which I bring to the task of being a researcher so that the reader can take my perspectives and perhaps prejudices into account. My perspective as a researcher is informed by an accumulation of life experiences and education including doctoral research training in recent years. Chapter 1 includes *The Story Behind the Story* which helps the reader to understand what questions I was trying to answer and what drove me to pursue these issues. This story includes career and educational experiences alongside intellectual curiosities which have developed over time. In Chapter 2 I have articulated the post-structural discursive perspective which underpins my standpoint as a researcher. This perspective calls attention to the relationship between knowledge, power and discourse, and its purpose is to highlight how some voices are heard, and counted as knowledge, while others are silenced or marginalised. There are three relatively silent groups to whom my research seeks to *give voice*. Firstly, my research is focused on the learner perspective and it therefore seeks to redress the balance in a field which is dominated by the views of management educators. Secondly, I hope to bring into view managerial practitioners employing approaches which might be described as *alternative* or *unconventional*, by which I

mean different and disruptive to the dominant discourse on management. Thirdly, I am motivated to give voice to female managers who have wrestled with, and perhaps challenged, the masculine imagery of management.

Reflecting on why I want to give voice to these three marginalised constituencies, reveals once again that they are all aspects of my own life. I have already acknowledged that many researchers pursue subjects which enable them to make sense of their own puzzles and predicaments, and I am no different. As a graduate of many management development programmes, I am keen to explore the stories of fellow learners who have sought to change and develop their practice rather than simply boost their earnings and CV. As a woman I am frustrated by the masculine orientation of much of the rhetoric on management and this might explain my personal distaste for the systems-control conception of management and management education programmes which reproduce it. As a wife and working mother I believe in maintaining balance between work, in the public sphere, and family life, in the private sphere, and a sense of personal coherence and integrity between them. This necessarily influences my practice as a manager, fuelling my interest in developing modes of behaviour which “nourish and sustain the human spirit” (Wheatley, 2001 p3) rather than practices which control, isolate, exploit and de-moralise people. As a Christian I have a profound concern for the responsible stewardship of the planet and hence the sustainability of the lives we lead. I am offended by a ‘greed is good’ orientation underpinning any activities, but particularly in a corporate context. There are probably many more assumptions, beliefs, values and orientations which I bring to this research but in the space available I have articulated those which I believe to be the most significant. An attentive reader may notice others leaking through the text!

### 5.1.2 Epistemology

When the idea of objective knowledge about social phenomena is rejected then a researcher faces difficult epistemological questions. Epistemology is a branch of philosophy dealing with the theory of knowledge and in social science research it can be thought of as:

“...the principle and rules by which you decide whether and how social phenomena can be known, and how knowledge can be demonstrated.” (Mason, 2002, p16)

Having decided to undertake semi-structured interviews with the research subjects to hear the learner's account of various experiences, this raised questions about the type of knowledge this would generate and the extent to which it could be regarded as *valid* and *reliable*.

#### 5.1.2.1 Knowledge

In metaphorical terms an interviewer is either a miner or a traveller (Kvale, 1996). As a miner the interviewer seeks to uncover pre-existing knowledge in the form of objective facts which are regarded as authentic and unchanged by the interviewer or the interview process. This *positivist* approach is based on the assumption that such facts exist 'out there' and the researcher's task is to elicit these facts from the interviewee via a standardised interview (e.g. multiple choice questions) designed to generate exactly the same responses regardless of the researcher or the research setting (Silverman, 2001). Such interview outcomes can be accorded the status of factual data and analysed purely in terms of *what* was said (ibid).

In contrast the traveller wanders into another country to see, hear and share stories which are subsequently re-told on return to his/her own land (Kvale, 1996). Re-telling the stories involves acts of interpretation and re-interpretation on the part of the traveller. However, there are significant choices to be made by the traveller in terms of how to approach both the generation and analysis of interview data. One option is the *emotionalist* approach which is concerned with the lived experience of the interviewee from whom the researcher aims to elicit authentic accounts (Silverman, 2001). In order to achieve this, the researcher seeks to establish a rapport with the interviewee by sharing experiences and feelings such that both parties become emotionally involved in the encounter. Emotions are often the focus of such research. As in the positivist approach, the interview outcomes are analysed in terms of *what* was said. Critics of the emotionalist approach have questioned whether another person's 'authentic reality' can really be accessed, citing issues such as the extent to which people choose to present themselves and potentially fabricate accounts depending on their relationship with the interviewer. Where the researcher is interested in emotions, then doubts have also been expressed about whether interviews provide evidence of emotions or merely the research subject's *expressions* of their emotions (Gubrium and Holstein, 1997 in Silverman, 2001).

As an alternative the *constructionist* approach treats the interview itself (*how* knowledge is being constructed) as a topic worthy of analysis, while still retaining an interest in what was said by the interviewee (Holstein and Gubrium, 1995; Silverman, 2001). In part this approach is informed by *ethnomethodological* methods such as conversation analysis and discourse analysis, which focus entirely on how the talk is

assembled and knowledge constructed. For example, conversation analysis involves minute scrutiny of dialogue observed in naturally occurring talk the aim being to:

“...describe people’s methods for producing orderly social interaction”

(Silverman, 2001 p167)

This includes an analysis of conversational openings, turn-taking, and repair mechanisms. Alternatively, discourse analysis describes various ways of analysing talk and text all of which focus on how people construct versions of their world.

Mostly applied to naturally occurring talk, it is *anti-realist* meaning that it denies that these accounts can be regarded as either true or false descriptions of reality. Instead it is primarily concerned with *what people do (perform)* with words, such as invoking a particular identity (e.g. that of ‘injured party’ in a conversation with a marriage counsellor) or using a particular repertoire (e.g. ‘parental responsibility’ in a conversation with a doctor).

Based on earlier discussions, my orientation was clearly that of a traveller (Kvale 1996). The interviews were sites of knowledge construction in which the research subjects were not passive vessels of answers but active makers of meaning.

“Meaning is not merely elicited by apt questioning nor simply transported through respondent replies; it is actively and communicatively assembled in the interview encounter.” (Holstein and Gubrium, 1995 p4)

My role was to provoke conversation relevant to my research interests so that during these social interactions, each research subject would combine their stock of experiential materials and repertoire of interpretive methods (e.g. ideas, language) in ways which addressed the topics in question (Holstein and Gubrium, 1995).

Hence the outcomes from these interviews would be situated accounts produced in particular time and place by two specific people. Analysis of the interview transcripts would be an act of interpretation and therefore a site for the construction of knowledge. One aspect remained unresolved, the extent to which the analysis would focus on *what* was said as opposed to *how* it was said, and this issue is addressed later in Section 5.3 *Analysing and interpreting data*.

### **5.1.2.2 Truth, reliability and validity**

In scientific research, objectivity or truth is usually assessed in terms of the *reliability* and *validity* of the data (Holstein and Gubrium, 1995). Reliability refers to getting the same answers to the same questions regardless of who undertakes the research and where the research is conducted, and validity refers to the answers being judged as correct. In semi-structured interviews questions of reliability and validity of research data are still relevant but are understood in terms of the research approach being “thorough, careful, honest and accurate (as distinct from true or correct...)” (Mason, 2002 p188). This involves providing clarity with regards to one’s inquiry paradigm and absolute transparency in demonstrating how data was generated, analysed and interpreted (Mason, 2002). The same questions do not necessarily generate the same answers even in a subsequent interview between the same researcher and research subject. Hence transparency of the researcher’s role is crucial if the reader is to be able to judge the validity of the knowledge emerging from the process (Watson, 1994). In order to be as transparent as possible about my own role in the data generation, analysis and interpretation processes I have included the *researcher’s voice* in this account. This means that I have included my reflections on the research process, in the first person, and as far as possible I have articulated my own sources of bias. Furthermore, in order to satisfy myself and the reader that my data analysis and

interpretation are valid, I have used my writing as a vehicle for demonstrating what I have done. Throughout the presentation of findings, I have used interview quotations to argue that my interpretation is reasonable rather than as evidence of a fact.

Hence the findings from this research cannot be assessed as either true or false.

Instead, drawing on Watson's (2002) *pragmatist theory of truth*, the reader can decide whether to regard them as 'truer' than other knowledge depending on whether they constitute a more trustworthy guide to practice. For example, management educators might regard the findings as 'truer' than other knowledge if they usefully inform their design and delivery of programmes. Applicants for management education programmes might judge them as 'truer' than other knowledge (e.g. business school brochures) when deciding which programme of study to undertake. This is different to judging knowledge on the basis of how accurately it describes something which actually happened (e.g. in a court case), or judging it in terms of how well it fits in with everything else we know (i.e. how plausible it seems) (ibid).

### **5.1.3 Methodology**

Methodological strategy guides decisions regarding the choice of research method and data sources appropriate to the research questions, to ensure that meaningful arguments can be formulated to answer these questions (Mason 2002). Mason clearly distinguishes between method and methodological strategy the former being the investigative technique such as interviews and the latter being defined as:

“...methodological strategy is the logic by which you go about answering your research questions” (Mason 2002, p30).

I have adopted this distinction, addressing methodology in the following section and method later.

### **5.1.3.1 Strategy and rationale**

As an apprentice researcher learning about methodology, I felt lured into a bewildering world of paradigms and philosophies, strategies and schools of thought within the social science research literature (Burrell & Morgan, 1979; Gill & Johnson, 1997; Guba & Lincoln, 1994; Easterby-Smith, 1991). There was a temptation to select a fashionable ready-to-wear label which would enable instructions to be followed and research methods to be justified. However, I resisted this temptation and instead focused on establishing a coherent approach to answering my research questions, one which was relevant to the questions and consistent with my intellectual orientation (Mason, 2002). Thus I engaged with the logic, aims, processes and assumptions hidden by the various methodological labels, in order to clarify my assumptions and thereby locate myself within the methodological terrain. This was an iterative process throughout the entire research project.

Methodological strategies fall into two broad categories, *nomothetic* (sometimes called *positivist*) and *ideographic* (Burrell & Morgan, 1979; Gill & Johnson, 1997; Guba & Lincoln, 1994; Easterby-Smith, 1991). A *nomothetic* methodology is characterised by deductive reasoning, beginning with a theory or hypothesis which is tested and either confirmed or refuted. The aim is to explain or establish causal relationships and general law-like statements. The researcher is viewed as independent of the research process which involves a high degree of structure with the aim of replicability and generalisation. Hence quantitative data is typically involved but also qualitative data in some cases. In contrast, an *ideographic* methodology is characterised by inductive reasoning, beginning with empirical data in which patterns may lead to hypotheses and theories. The aim is to focus on meanings and

impressions rather than facts hence qualitative data is typically involved although not necessarily exclusively. The research process typically involves first-hand knowledge of subjects, getting inside everyday situations. There is less concern with replicability and generalization and an understanding that the researcher influences the process.

My research questions were centred on learners' perceptions of the consequences, both emotional and practical, of participating in critical postgraduate management education. I had not begun with a theory or hypothesis hence my method of reasoning was clearly inductive. My research would be focused on the learners' own accounts involving impressions and perceptions rather than facts hence *qualitative data* would be generated. I had decided that the data which would most usefully illuminate my research questions was the participants' own descriptions of their thoughts, emotions and experiences. Therefore the focus of my research was human experience not 'as witnessed by another' but 'as described by the person involved in the experience'. My approach was therefore broadly phenomenographic working in the spirit of Brookfield's (1994) study of adult educators. Having researched phenomenography in detail, I concluded that it was consistent with my research and provided a useful guide for the later stages of data analysis and interpretation.

### ***5.1.3.2 Phenomenography***

Phenomenology and phenomenography both have human experience as their object of study (Marton, 1994). Phenomenology is concerned with describing the meaning of human experiences in vivid, rich and accurate terms so that the essence of a particular phenomenon or experience can be revealed (Moustakas, 1994). In contrast, phenomenography does not seek to find the singular essence of a particular phenomenon but instead explores the world as it is experienced by different people:

“Phenomenography is the empirical study of the different ways in which people experience, perceive, apprehend, understand, conceptualise various phenomena in and aspects of the world around them.” (Land of phenomenography, 2006))

Thus in phenomenography the researcher is interested in the phenomenon as experienced and described *by the research subject* rather than in the phenomenon itself as is the case in phenomenology. The word phenomenography is derived from the Greek words ‘phainomenon’ and ‘graphein’ which mean ‘appearance’ and ‘description’ respectively, thus phenomenography means the description of appearances (Marton and Fai, 1999). Phenomenography is founded on a *non-dualist* ontology, rejecting the Cartesian separation between the thinking mind and the world beyond that mind (Marton, 1981). Rather than being ‘out there’ social reality is seen as constituted in the relation between the individual (subject) and the phenomenon (object) (Trigwell, 2000). This means that the experience, perception and conceptualization of the object (the phenomenon) as understood by the subject (the person experiencing the phenomenon) is not independent of the subject. The subject describes the object as they experience it, and they can only do so using concepts, language and frames of reference available to them from within their world (Marton 1981). Hence the way in which the subject describes and communicates knowledge of the object is dependent upon the subject. Reality is therefore:

“...seen as being constituted as the relation between the individual and the phenomenon.” (Trigwell, 2000 p78)

Phenomenography is *qualitative* rather than quantitative in that it is concerned with descriptive accounts which pay attention to meaning, capture the individual’s point of view, secure rich descriptions and stress the socially constructed nature of reality (Denzin and Lincoln, 1994). It is a *second-order* approach because the researcher

focuses on the phenomenon as described by the research subject, as opposed to a first-order approach in which the researcher would describe the phenomenon as perceived by him/her (Trigwell, 2000). It can broadly be described as an *interpretivist* approach in that it regards:

“...people, and their interpretations, perceptions, meanings and understandings, as the primary data sources.” (Mason, 2002 p56)

In phenomenography a variety of methods have been used for generating data, but the individual interview has been the dominant method (Land of phenomenography, 2006). This is because phenomenography has human experience as the object of study and as a second-order approach the researcher is interested in the phenomenon as described by the research subject. The aim is to facilitate a dialogue which enables the subject to change un-reflected and un-thematized aspects of their experiences into reflected and thematized understandings. Once the phenomenon has been reflected on then awareness is changed and this is often an irreversible process. Phenomenography is concerned with *variations* in the way a phenomenon is experienced rather than seeking the essence of a phenomenon in all its richness and fullness. The most essential outcome of phenomenographic research is descriptions of the different ways in which people experience phenomena and thereby variations in how the world is conceived by them (Marton, 1994).

I concluded that a phenomenographic approach was entirely consistent with my inquiry paradigm and with the nature of purpose of my research. It also confirmed my choice of method, this being semi-structured interviews. Semi-structured interviews are particularly appropriate where there is a desire to hear what the interviewee has to say on topics identified by the researcher, in a way which is interactive thus allowing

clarification and exploration as the conversation unfolds (Arksey & Knight 1999, Mason 2002). However, there are also a number of issues and limitations associated with semi-structured interviews including the interviewee's desire to make a good impression; the influence of the interviewee's perspectives (beliefs, attitudes); the difference between what is said in the interview and what is said and done in practice; the influence of cultural norms affecting how one talks about the subject matter; and the difference between the interview context and real-life work situations (Alvesson 1996). I concluded that that these issues could not be overcome but instead acknowledged during the analysis and interpretation of the interviews.

#### **5.1.4 Reflection**

Having engaged with the literature on research and explored my inquiry paradigm, I concluded that it was necessary and important to re-visit and refine my original research questions, which were:

- How do people in leadership/management roles in a variety of work organisations perceive the consequences of participating in critical postgraduate management education? In particular:
  - ⇒ How do the learning experiences influence their practice?
  - ⇒ What emotional responses do participants experience?

My aim had been to gain a deeper understanding of managers' perceptions of their experiences, but the wording of my research questions now seemed inappropriate. For example the opening question "How do people...perceive the consequences of..." is a question which a psychologist would need to answer in terms of how the brain generates perceptions. Secondly, the question "What emotional responses do participants experience?" suggests that these emotions can be *known*, whereas the

earlier discussion reveals that only the research subjects *expressed emotions* are possibly knowable. Furthermore, the question “How do the learning experiences influence their practice?” seeks to establish a causal relationship about which I felt increasingly uncomfortable as a result of my inductive approach and focus on meanings and impressions rather than facts. My research was focused on *social phenomena* such as thoughts, concepts, emotions and social interactions (management activities) *as experienced by the research subject* and as described by them via the *language* they chose to employ. As well as being centred on the *learner perspective*, I had focused on the possibility of managers experiencing *transformative learning* and employing *unconventional approaches* at work. After much thought and reflection I re-crafted my research questions as follows:

- When experienced management practitioners participate in critical postgraduate management education:
  - a) What emotions do they associate with the learning experience?
  - b) What emotions do they associate with their transfer of learning into the workplace?
  - c) What changes in their conceptual frames of reference do they attribute to the learning experience?
  - d) What changes in practice do they attribute to their learning experience?
  - e) What reactions from colleagues do they describe experiencing?
  - f) What does their language tell us about the conceptual frames of reference which inform their thinking and managerial practice?

With these more carefully worded questions I felt I had a much clearer basis on which to move forward.

## **5.2 Conducting fieldwork**

Chapter 3 provided a comprehensive description of the research sites and the reasons why they were chosen. Therefore this section focuses on selecting and briefing the research subjects and generating data. In order to understand the decisions made it is necessary to understand the context in which the research took place. The research began in late 2004, with initial interviews in 2005 and submission of an MPhil thesis in 2006. Following upgrade to PhD in January 2007, further interviews were undertaken in 2007. However, there was a long gap between these and their subsequent analysis in 2009. This was due to two periods of intercalation prompted by significant family events detailed in *Personal Reflections* (section 9.3).

### **5.2.1 Research subjects**

Meeting the goals of the study described earlier, required research subjects who had been applying their learning in the workplace for some time, but for whom the learning experiences were still relatively recent. So, in February 2005 I contacted the Director of each selected programme and secured agreement to invite students from their 2003-05 cohort to participate in my research. At this point, both cohorts were completing the taught phase and commencing their dissertations. I sent an *Invitation to Participate* (Appendix A) to all students in the relevant cohorts, outlining my research interests and requesting their involvement. As a member of staff at Exeter, I had met the Exeter students several times during their programme. Hence relationships were established and I was able to hand out my research invitation in person. In contrast I had not met the Ashridge students so I arranged to attend a

session during one of their modules to introduce myself and issue the invitation. However, this was cancelled by the programme director who felt that my presence might disrupt the schedule, and a member of faculty circulated the invitation on my behalf. Following a self-selection process five out of ten Exeter students and seven out of fifteen Ashridge students volunteered, making a total of twelve research subjects. Having reviewed previous research studies I was satisfied that this was an appropriate number for the type of qualitative research I was undertaking. I subsequently received an additional volunteer from each cohort and these individuals agreed to be reserves in the event of anyone dropping out, which was ultimately not the case.

I reflected on whether the volunteers represented the larger group of students who had participated in the Exeter and Ashridge programmes and whether this mattered. There are two ways of viewing **representation**. One involves securing a representative segment of the total population so if the population is say 55% male and 45% female then the researcher aims to have a sample with this same mix. This enables the researcher to make generalised claims about the whole population based on the findings emerging from the sample. However, such generalisations did not feature among my aims hence I was not concerned from this point of view. The other form of representation is to generate and analyse ‘representative horizons of meaning’ so the sample is assessed according to the range of responses which emerge (Holstein and Gubrium, 1995 p74). If the sample is right, then involving additional people will generate accounts falling within the range of meanings which have already emerged. I had no way of knowing whether my sample was right from this perspective, but I

concluded that meeting this criteria was not necessary in order to make a contribution towards filling the knowledge gap which had been identified.

### 5.2.2 Interviews

The first round of fieldwork was conducted from March to October 2005, comprising a semi-structured interview lasting approximately one hour with each of the twelve research subjects. These were conducted face-to-face in a variety of venues (e.g. place of work, home). Two weeks prior to each interview the *Information Sheet for Research Subjects* (Appendix B) was sent to them. This provided details about the research and the forthcoming interview including three questions which I planned to discuss with them during the interview:

- How did you come to be on the programme?
- What's it been like?
- What are you experiencing as the effects?

This information sheet also sought their permission to tape record the interviews, gave reassurance with regards to confidentiality of identity and also gave reassurance about disclosure and publication of the findings. The interviews were tape recorded and subsequently transcribed. A few weeks after each interview, the transcription was returned to each research subject for review and clarification in a few instances where the tape recording was faint. Each research subject was given the option of editing the content should they wished to remove sensitive information. Only one research subject revised any text in a section which was not central to the subsequent data analysis.

The questions on the *Information Sheet for Research Subjects* (Appendix B) were used to guide the conversation during the initial interviews. In addition, a more

detailed set of *Interview Questions 2005* (Appendix C) was used when the conversation needed steering, prompting or further probing. Every effort was made to ask open rather than closed or leading questions and to ask follow-up questions using the interviewee's own terminology wherever possible. Some interviewees took the conversation into their own hands and it was difficult to keep them focused on the three areas of interest. Handwritten notes were occasionally made during the interviews mainly to capture points for further exploration later in the interview. In a few cases, gestures or facial expressions were noted as they accompanied certain phrases. The handwritten notes did not record what was said as the tape recorder was used for this purpose.

A few weeks after completing the initial interviews in 2005, an email was sent to all research subjects asking them for confirmation of the following personal details:

- What is your age?
- How many years of work experience do you have?
- How much of your work experience has been in a managerial/leadership role?
- Do you have an MBA?

This information had emerged during some interviews but in order to ensure consistent treatment of all research subjects, this follow-up process was initiated. Having gathered this data I reflected on why I wanted it and whether it would influence the analysis and interpretation of the interviews. The findings from Nord and Jermier (1992) had indicated that age, gender and experience might be contributory factors affecting people's willingness to participate in programmes adopting a critical perspective hence I concluded that this prompted me to gather equivalent data in respect of my research subjects.

In between the first and second round of interviews, my review of the literature and analysis of initial interviews indicated that some research subjects were describing elements of ‘relational practice’ (Fletcher, 1999) within their repertoire at work. I was intrigued by Fletcher’s (1999) argument that relational practice is not recognised and rewarded within some contexts because the behaviours are coded feminine and therefore not regarded as work. Hence I refined the detailed research questions involved in the second round of fieldwork in order to take my initial findings and Fletcher’s (1999) thesis into account. This is broadly consistent with Grounded Theory (Glaser and Strauss, 1967) which involves both inductive and deductive reasoning. Initially an inductive approach is employed to work from the data towards a hypothesis and then on the basis of this hypothesis, a deductive approach is employed to gather more data and hence test the hypothesis. Having noticed that some of my research subjects appeared to be employing relational practices, I was keen to explore whether or not they were being recognised and rewarded for this style of behaviour.

The second round of fieldwork was undertaken from May to December 2007. The research subjects were contacted via email in May 2007 and invited to participate once again in the research. All of them agreed. In order to re-connect with the research subjects, a series of open questions was sent to them via email, and they were asked to respond in free-format writing by the end of July. These *Questions May 2007* (Appendix D) explored three areas:

- The extent to which they had sustained/developed changes in their practice.

- The extent to which they felt that their practice was different to the ‘norm’ within their organisation and if so, whether this impacted the reward/recognition which they received.
- Any other reflections on the ways in which they felt their learning had influenced their practice.

Five of the twelve research subjects responded in writing thus generating additional data which has been included in the analysis and findings. Semi-structured interviews were arranged with all of the research subjects and these took place between October and December 2007, each lasting approximately thirty minutes. Due to resource constraints (time and funding) these interviews all took place over the telephone. Prior to the interviews, each research subject was sent a set of *Interview Questions 2007* (Appendix E) outlining the questions which I planned to discuss with them, which were:

- What is your current working role and situation?
- Do you regard yourself as performing your role differently – compared to your practice before doing your Masters?
- Do you regard yourself as performing your role differently – compared to the ‘norm’ within your organisation?

At the beginning of each interview the terms of engagement were reiterated, including a commitment to confidentiality in terms of identity and reassurances about disclosure and publication of the findings. The interviews were digitally tape recorded (via a device connected to the telephone) and subsequently transcribed.

### **5.3 Analysing and interpreting data**

The 2005 interviews were initially analysed in 2006 but the 2007 interviews were not analysed until 2009 due to personal circumstances referred to earlier. As the project

progressed, my understanding and skills developed, hence the data analysis was repeated and refined several times, with each iteration employing a more thorough and methodical approach. This account documents how the data analysis was originally undertaken in 2006 and then eventually undertaken during 2009/10 when both sets of interview transcripts were analysed and re-analysed to ensure that the approach was rigorous and consistent throughout. This facilitated re-engagement with the older data but as a manual approach had been chosen this task was labour intensive and time consuming.

### **5.3.1 Status of data**

As discussed earlier, some research methodologies focus on analysing the social process of the interview itself (*how* knowledge is being constructed) while others focus on the content (*what* is being discussed) (Silverman, 2001). Some scholars recommend analysing both content (*what*) and form (*how*) in order to avoid marginalising *what* the research subjects say, whilst also avoiding misjudging the epistemological status of qualitative interview data (Holstein and Gubrium, 1995). What type of analysis would be appropriate for my research? Firstly it was clear that the refined research questions could not be answered via methods such as conversation analysis and discourse analysis, as these focus entirely on how talk is assembled and knowledge constructed. Secondly, despite initial concerns about focusing solely on the content, I eventually concluded that analysis of the content (*what* was said) would enable me to answer these questions and still remain consistent with my methodology. Phenomenography focuses on phenomena as *experienced and described by the research subject* hence it is legitimate to analyse *what* is said without necessarily according this the status of authentic reality. Had my research questions remained as before, such as “what emotions do the subjects experience” then content

analysis and the findings emerging from this would appear to have the status of fact, resulting in statements such as “these are the emotions which they experienced.” This would be epistemologically flawed. However, the revised research questions, such as “what emotions do the subjects associate with the learning experience” are consistent with content analysis because findings depict the research subjects’ own descriptions of their experiences. Therefore the findings say “these are the emotions which they described and which they associated with their learning experience” thus accurately reporting the account constructed by the research subjects without taking a position on whether this was or was not their authentic reality.

### **5.3.2 Data analysis pilot**

#### ***5.3.2.1 Approach***

During the initial analysis conducted in 2006, the content of the interview data was analysed using a phenomenographic approach (Marton 1981; Johansson *et al*, 1985; Marton *et al*, 1993; Sjostrom and Dahlgren, 2002; Trigwell and Prosser 1996; Trigwell 2000). This began with *familiarization*, involving listening to the audio-tapes while reading the transcripts to correct transcription errors, insert missing words and note non-verbal features of the conversation such as long pauses or laughter. The *familiarization* stage then moved into reading the interview transcripts several times both *literally* and *interpretively* to look for similarities and differences in the ways in which the subjects described the phenomena in question. At the time this analysis was focused on the original research questions which centred on the research subjects’ *perceptions* of:

- a) how the learning experience had influenced their working practices;

- b) the emotional responses they had experienced as a consequence of their learning experiences.

Through repeated readings of the interview transcripts, sections of the text relating to either of these topics were highlighted. In addition, text was highlighted where the research subject described their motivations for doing the programme, how their *understanding* of organisations, management and leadership had developed as a result of the learning experience, and anything else relating to their learning or practice, which appeared potentially interesting. It was unclear how these sections of text might help to answer the research questions but the aim was to remain open to ideas emerging from the interviews. This resulted in sections of the transcripts being indexed according to the following *themes*:

- Reasons for doing the programme
- Emotional response
- Change in understanding (relating to organisations, management, leadership)
- Change in practice
- Interesting comments on learning or practice

The highlighted sections of text were then taken as excerpts, literally cut and pasted into another document and grouped according to these themes. This *compilation* process was repeated for each research subject (Sjostrom *et al* 2002). Then, the complete collection of excerpts across all research subjects was reviewed along two dimensions, the individual and the collective. The individual dimension involved reviewing the excerpts alongside the original transcripts for each research subject in order to make sense of:

“...what the same person has said about other things.” (Land of phenomenography, 2006)

The aim of reviewing the data along the individual dimension was to ensure that the excerpts did not become decontextualised and this was supported by listening repeatedly to the interview tape recordings. The data was then reviewed across the collective dimension to identify the range of different ways in which each phenomenon was described across the group of research subjects. This resulted in:

“...the pool of meanings” that derives from what all participants have said about the same thing.” (Land of phenomenography, 2006)

This pool of meanings was expressed in terms of a number of *groupings* of excerpts which appeared to describe the phenomenon in a similar way (Sjostrom *et al*, 2002). For example several research subjects described becoming *more relaxed* as a result of their learning experience. Hence excerpts grouped under the broad theme of *emotional response* were further sub-divided to bring together those in which the subjects described being *more relaxed*. Thus specific *categories* such as *more relaxed* and *more confident* were named to express the range of emotional responses described by the research subjects. Similarly, a number of categories such as *less controlling* and *conversational* were named to describe the changes in working practices described by the research subjects. Working back and forth from the transcripts and the thematic grouping of excerpts, these *categories* were named, re-named, sub-divided and combined in an effort to “emphasize their essence” (Sjostrom *et al*, 2002, p341), ensure that they were reasonable interpretations of what the research subjects had said and were sufficiently differentiated to portray the range of experiences described by all research subjects. Finally the categories and research subjects were tabulated in two matrices one relating to working practices and the other emotional responses.

### **5.3.2.2 Issues**

While writing-up the findings I experienced a significant sense of unease as two methodological inconsistencies emerged. Firstly I was writing as if I was an independent objective observer not involved in the research process and hence the construction of the interview data (Hatch, 1996). How could this be right when I had seen myself as a situated speaker involved in both the generation and interpretation of the interview data (Mason 2002)? Secondly I was making statements such as “several subjects experienced xyz...” and then presenting quotations from the interviews as evidence of these conclusions. These quotations had become disembodied from their context and originators and had instead evolved into apparently objective evidence of a social phenomenon. This did not feel right and I discovered that other qualitative researchers had experienced these issues (e.g. Richardson, 1994). I was concerned that I had selected and pruned quotations in order to substantiate my arguments, but in what way did these quotations constitute evidence and why had I selected some and not others? After much reflection and various reviews of my data analysis, I decided that I needed to present my findings in a different way in order to satisfy a number of aims. Firstly, I wanted to retain the authenticity of each research subject’s account and an appreciation of the context in which it was constructed, by presenting the findings for each individual research subject in the context of their overall story. Secondly I reminded myself to be as transparent as possible about my own role in the data generation, analysis and interpretation processes. Thirdly, I endeavoured to satisfy myself and the reader that my data analysis and interpretation was valid by using quotations to argue that my interpretation was reasonable rather than as evidence of a fact.

The second round of interview transcripts were initially analysed using the same approach as undertaken in 2006. However, further problems emerged prompting a fundamental reassessment of the approach. For example, the first set of data lacked an audit trail from the highlighted text within the transcripts to the *categories* which had finally emerged. Some sections of text were highlighted and coded as *change in practice* whereas they featured in the findings as an illustration of a *less controlling* approach to managerial work, this being one of the detailed *categories*. Similarly the highlighting of *emotional responses* within the interview text did not differentiate between those relating to learning experiences on the programme, the application of learning back at work, or some other situation in the research subject's life. This was inconsistent with the presentation of findings which differentiated between these situations. I concluded that the original data analysis and coding had been sloppy and inconsistent, and that this needed to be resolved. To exacerbate this problem, the literature review had developed significantly between 2006 and 2009, as a result of which the original coding did not provide sufficient handles on the data to support the development of arguments relating to the research questions and concepts in the literature. In essence, the analysis and write-up for the first round of interviews had become a pilot study, which enabled me to trial my methods and learn from my mistakes.

### **5.3.3 Data analysis**

#### ***5.3.3.1 Coding the data***

Resolving the issues identified in the pilot study, required a systematic approach to coding the data in a standardized manner and applying this consistently throughout all twenty-four interview transcripts. This would enable sections of the text to be

organised and retrieved for further analysis across the collective dimension (what all research subjects have said about the same thing) and the individual dimension (what each subject has said about other things) as a basis for developing illustrations and arguments relating to my research questions.

Coding of qualitative interview data is typically based on four sources namely, theoretical literature, prior hypotheses, the research subjects own concepts and “codes created with the help of some form of abductive reasoning that approximates to grounded theorizing.” (Seale, 2003 p295 in Holstein and Gubrium, 2003). I decided to commence the coding process by creating a number of topics derived from my research questions, the literature on transformative learning, and the literature on the consequences for managers of *learning to change the game*. Hence the final round of data analysis began with the following broad themes:

Orientation towards the learning experience:

- Reasons for doing programme
- Emotions about programme

Learning:

- Nature of learning
- Change in meaning perspective (goal orientations, mindsets, worldviews)
- Emotional response to learning

Application:

- Changes in practice
- Social (reaction of others)
- Emotional response

Specific categories and sub-categories were then generated from in vivo concepts within the transcripts through ongoing reading, interpretation and analysis. For example the broad theme called *Application – changes in practice* generated the category *Application – experimenting* with a number of sub-categories such as *Conversational* and *Allowing solutions to emerge* derived from the data. As new categories were identified and defined each interview transcript was re-visited and where necessary re-coded to ensure that all of the categories were applied consistently. This was a time consuming and labour intensive process requiring several iterations. Appendix F details the final themes, categories and sub-categories which emerged from the data analysis process. This final set did not emerge until part way through writing up the research findings in Chapter 6 and this was an important point of learning. I had originally expected to complete the data analysis and then write-up the findings but these two processes were interwoven and took place iteratively as I worked with the data to identify the range of experiences described by the research subjects.

Throughout the analysis and interpretation, each decision to assign interview text to a category or sub-category was based on the stated or perceived intent of the actor (interviewee) and not the effect of their action, which could not be known. For example, when Amy talked about her intention to “completely give up control” this was coded as *Application – experimenting – less controlling* regardless of whether or not Amy was actually putting her words into practice. Some decisions to assign interview text to a category or sub-category required interpretation. For example, when Fiona described how she would enquire to find out “what people wanted to start doing and stop doing” instead of “going in with a pre-planned, pre-cooked version of

what might be appropriate” then this was also coded as *Application – experimenting – less controlling*. In these instances categories and sub-categories were only attributed to slice of text where it seemed reasonable to interpret this from the transcripts.

Where a category was not associated with interview text and hence that finding was not been attributed to the research subject, then this does not necessarily mean that they did not experience that emotional response or that they do not approach their working practice in that way. Instead it means that the interview transcripts did not, in my view, support that interpretation.

The development of categories for the research subjects’ descriptions of their *emotional responses* presented its own challenges, mainly relating to the standardization of coding categories and their consistent application. To illustrate the problem, consider the following excerpt from a transcript:

“In the beginning I found it very, very, very uncomfortable to be in this big group and would go for hours without saying anything and get cross or upset or bored and then towards the end feeling very comfortable with it.”

The initial coding in 2006 had simply coded this as an *emotional response* and subsequently categorised this as the learner feeling *unsettled* and *irritated*. The subsequent attempt to improve the robustness of the analysis resulted in several *expressed emotions* being attributed to this paragraph namely, *uncomfortable*, *cross*, *upset*, *bored* and *comfortable* using the research subject’s terminology. However, this approach was also unsatisfactory for two reasons. Firstly there was no basis for coding interview text which required interpretation. For example, Amy had said “When I got my first distinction it was quite wonderful” in which she expresses her delight in her achievement but she does so without naming her emotions. The second

issue is that the phenomenon called *emotion* is not consistently defined (Parrot, 2001) hence some of the in vivo concepts such as *cross*, were emotions while others such as *bored* described emotion-related mental states. In order to ensure that the coding of expressed emotions was as consistent and replicable as possible, a reputable theoretical source was chosen to inform the coding. This was the categorisation of emotions developed by W. Gerrod Parrot, Professor of Psychology and Georgetown University, Washington D.C. and documented in *Emotions in Social Psychology* (2001). This categorisation included primary emotions of love, joy, surprise, anger, sadness and fear with associated secondary and tertiary emotions. For example:

**Figure 11 Extract from categorisation of emotions (Parrot, 2001)**

Primary emotion	Secondary emotion	Tertiary emotion
Love	Affection	Adoration, affection, love, fondness, liking, attraction, caring, tenderness, compassion, sentimentality
	Lust	Arousal, desire, lust, passion, infatuation
	Longing	Longing

(Parrot, 2001)

To supplement this, a list of mental states developed by Lazarus (1991) was selected, which included terms such as *confidence*, *confusion*, and *determination*. Appendix F contains a summary of these coding sources (Parrot, 2001; Lazarus, 1991) which were used to code the data for emotional responses, differentiating between mental states (MS) and expressed emotions (E) which the interviewee associated with the programme (P) of study, with work (W) and with other (O) life events. The coding also differentiated in terms of the timing which the interviewee attributed to the expressed emotion, grouping the codes into three broad domains, these being before

(B), during (D) and after (A) the programme of study. This resulted in identifiers such as EPD to mean an expressed emotional response to the programme which the interviewee described as occurring during the programme. When the interviewee used words which matched the source lists (Parrot, 2001; Lazarus, 1991) then the coding was literal, for example:

<u>Interview text</u>	<u>Code</u>
<i>"I'm really beginning to enjoy it"</i>	EWD = Joy: Enjoyment
<i>"I went into it very naively and optimistically"</i>	EPB = Joy: Optimism

In other instances it was necessary to interpret the interview text in order to code the emotions which the subjects appeared to describe but not name. For example:

<u>Interview text</u>	<u>Code</u>
<i>"When I got my first distinction it was quite wonderful."</i>	EPD = Joy: Pride, Delight

In a few instances interpretation of the data indicated that the research subject was alluding to an emotion which they experienced, but in a way which made it very difficult to interpret the expressed emotion. These slices of text were eventually labelled as either *positive or negative* as in the following examples:

<u>Interview text</u>	<u>Code</u>
<i>"...so it has been an incredible journey"</i>	EPD = Positive
<i>"...it is fundamentally challenging some of the basic assumptions that we hold about our organisations, about ourselves, and that is really difficult."</i>	EPD = Negative

### ***5.3.3.2 Compiling and comparing***

When the coding all 24 interview transcripts was complete, the process of compiling and comparing the coded text was undertaken using the phenomenographic approach described earlier. However, this time the slices of coded text remained in the original transcripts instead of being compiled (cut and paste) into a separate document. As the coding and comparisons continued, a matrix was compiled tabulating categories and sub-categories against all research subjects, excluding those relating to emotions. Appendix G contains a copy of this matrix. This helped with cross-checking for consistency of coding and analysis across both the individual and collective dimension. Categories occurring for only one research subject were retained as a vital example of variation within the group, as long as these categories addressed the research questions. However, where this was not the case, then the category was removed. As well as assisting in the refinement and application of the coding categories, this matrix provided a basis for organising the retrieval of selected slices of coded text from the transcripts to illustrate the findings.

Ongoing engagement with the data included a longitudinal review of each research subject's overall learning journey as a result of which a number of groupings and patterns emerged. For example, several research subjects described experiencing a profoundly unsettling learning experience to which they attributed various changes in their thinking and practice and after which they felt much more positive about their work. However, another group of research subjects talked about enjoying their learning experience, avoiding anything unsettling, and experiencing few significant changes in their practice thereafter. Variations in learning journeys appeared to relate

to a number of dimensions associated with emotions and change. These dimensions were named as *journey descriptors*. Figure 12 below lists the *journey descriptors* for three of the research subjects, with the analysis for all twelve research subjects detailed in Appendix G.

**Figure 12 Sample of journey descriptors**

	<b>Hugh</b>	<b>Dave</b>	<b>Edward</b>
<b>JOURNEY DESCRIPTOR:</b>			
Troubling emotions during prog?	Yes	Yes	No
Troubling emotions after prog?	No	Yes	No
Much more positive after prog?	Yes	No	No
Change in meaning perspective?	Yes	Possibly	No
Significant changes in practice?	Yes	No	No

This resulted in the research subjects being sorted into four groups as a way of recognising similar patterns across several accounts of individual learning journeys. These four groups were labelled *Transforming*, *Transitioning*, *Dismantling* and *Broadening* and this provided an organising framework for the presentation of one portion of the findings in Chapter 6, which follows.

## 6 FINDINGS: STUDENTS' EXPERIENCES

This chapter presents findings from empirical research into the experiences of a group of management practitioners who participated in part-time postgraduate management education oriented towards *learning to change the game*. The research questions, refined in section 5.1, focused on the emotions, changes in frames of reference and changes in practice which the learners associated with their learning and transfer of learning into the workplace.

The chapter begins in Section 6.1 with pen portraits of the research subjects including characteristics such as age, work experience and role. The findings in section 6.2 focus on their learning experiences and are derived from analysis of the interviews undertaken in 2005, across all research subjects. The findings in Section 6.3 focus on the transfer of learning into the workplace and are derived from an analysis of the interviews undertaken in 2005 and 2007, across all research subjects. Consistent with a phenomenographic approach care has been taken to present both cross-sectional themes and individual variations. However, the primary focus is on those research subjects who described experiencing strong emotions, changes in their conceptual frames of reference and changes in their practice. Throughout this chapter I have endeavoured to retain the authenticity of the account constructed by each research subject in conversation with myself, the researcher. However, I have selected text extracts from the interview transcripts and therefore omitted other text, so the findings are necessarily my construction. Therefore, not only were the accounts actively assembled during the interviews (Holstein and Gubrium, 1995), they have subsequently been reassembled during my re-telling of each account (Kvale, 1996). I have remained aware of my role as a situated speaker involved in both the generation

and interpretation of the interview data (Richardson, 1994; Mason 2002). However, I have written about the subjects' experiences in an honest and transparent manner, substantiated via an audit trail from the interview transcripts, through the coding categories to the presentation of findings in this chapter. In order to satisfy myself and the reader that my data analysis and interpretation is valid, I have used my writing as a vehicle for demonstrating what I have done and I have used the quotations to argue that my *interpretation* is reasonable rather than as evidence of a fact. The findings presented here do not constitute evidence. Therefore when I write about the research subjects' experiences in the present tense such as "Amy experiments with a less controlling approach" I am not claiming that this is necessarily what Amy is actually doing in her working role. Instead I am conveying to the reader my interpretation of what Amy described as her approach at work. Furthermore, the practical and emotional consequences described in this chapter relate specifically to my research subjects and to the programmes which were selected as research sites. It is possible that similar self-reported experiences might emerge from other people attending the same or similar programmes but at present there is no basis on which to make such generalizations.

## **6.1 Portrait of research subjects**

The research subjects were drawn from relatively small cohorts (10 and 15 respectively) hence anyone associated with each programme would recognize the individuals involved. However, the research subjects agreed to participate on the understanding that they would remain anonymous so they are named using alphabetic identifiers (A, B, C etc) and false names e.g. A = Amy, B = Ben. These names are gender specific but in every other respect care has been taken not to associate them with personal characteristics which might allow individuals to be recognized.

Similarly the descriptions of the research subjects' organizations have been kept very general and the text deliberately avoids specifying which programme was attended by each research subject. The research subjects would recognize themselves in the presentation of the findings but this is appropriate bearing in mind the objectives of honesty and transparency. Some of the research subjects might also be able to recognize each other in the findings but to do so they must already know something about another person's developmental journey, in which case confidentiality has not been breached. Care has been taken not to disclose particularly sensitive information contained within the interview transcripts. Faculty and administrators associated with the programmes may be able to identify the research subjects, but this risk has been reduced by not specifying which programme each attended.

Earlier research undertaken by Nord and Jermier (1992) highlighted the diversity among managers on a number of dimensions including values, social orientation, personal characteristics and educational achievements. Figure 13 presents equivalent data for my research subjects.

**Figure 13 Personal characteristics of research subjects (Nov 2005)**

Gender	5 female, 7 male
Race	White Anglo-Saxon
Age	Ranging from 37 to 45
Nationality	1 Danish, 1 Irish, 10 British

The age range for the research subjects is relatively narrow when compared with the wider age range found on some MBA programmes. For example, an analysis of students starting an MBA at Exeter University during the years 2001 to 2005 shows that the ages range from 23 to 51 for full-time students and 25 to 51 for part-time

students. British nationals also constitute the majority of the research subjects, in contrast to the multi-national cohorts typical of MBA programmes.

**Figure 14 Work experience and role of research subjects (Nov 2005)**

Work experience	Ranging from 9 to 29 years
Managerial experience	Ranging from 3 to 19 years
Working role	3 external consultants 3 internal consultants 6 senior managers (or equivalent)
Type of organization	External consultants: <ul style="list-style-type: none"> <li>• 1 training &amp; development</li> <li>• 1 voluntary sector</li> <li>• 1 media</li> </ul> Internal employees: <ul style="list-style-type: none"> <li>• 3 large public sector</li> <li>• 1 pharmaceuticals</li> <li>• 2 oil/energy/minerals</li> <li>• 1 media</li> <li>• 2 manufacturing/technology</li> </ul>

Figure 14 shows the work experience and roles of the research subjects in November 2005. The Ashridge programme is designed for consultants, but only two of the Ashridge research subjects were external consultants operating within the broad domain of organizational development. A further three operated as senior internal consultants and two held senior management positions. Among the Exeter research subjects, one was an external consultant and four were in senior management positions.

**Figure 15 Educational achievements of research subjects (Nov 2005)**

Graduate?	8 = Yes 3 = No 1 = Unknown
Has an MBA?	1 = Yes 11 = No

Although the majority of the research subjects were graduates, (Figure 15) most had not been in education for some time and several expressed apprehension about studying on a Masters level programme.

## 6.2 Learning and emotions

These findings present the research subjects' descriptions of their learning experiences and emotional responses to these, addressing two of the refined research questions, namely:

- a) What emotions do they associate with the learning experience?
- c) What changes in their conceptual frame of reference do they attribute to the learning experience?

Findings have been derived from the interview transcripts via the coding categories in Appendix F labelled *Learning – nature of* and *Learning – transformation* plus those for emotions labelled EPD meaning “Emotions Programme During”. In order to retain a connection with their originators and context, the findings in section 6.2 are presented within my telling of each research subject's overall story. Hence each time a *new* research subject is quoted this is preceded by a description of their working role and the reasons given by them for undertaking their chosen programme of study, derived via the coding category labelled *Entry to programme* in Appendix F.

My research questions originated from concerns for the well-being of managers involved in challenging what Mezirow (1990, 2000) defined as a meaning perspective, this being a frame of reference comprising values, beliefs, goal orientations and assumptions. So, in order to retain a holistic view of the emotional responses described by the research subjects, the findings present these alongside the type of learning they described experiencing, including transformative learning in some instances. When transformative learning takes place the learner not only thinks differently, they also act differently. Hence in analysing whether each research subject possibly experienced transformative learning, the coding category labelled *Application – changes in practice* has also been taken into account. In broad terms, transformative learning has been associated with those research subjects who claimed to have challenged their mindsets, worldviews and goal orientations, experienced deep and troubling emotions during the learning and adopted significant changes in their practice thereafter. Note that the findings for transfer of learning into the workplace are presented later in Section 6.3 which encourages the creation of a neat dividing line between an individual's learning and the application of their learning. As this dividing line is entirely artificial, the edges are deliberately blurred in some areas.

### **6.2.1 Transforming**

Analysis and interpretation of the data suggests that Amy, Hugh and Ian each experienced a process of perspective transformation characterised by intense emotions and significant changes in their perspectives and practice.

#### **6.2.1.1 Hugh**

Hugh was an internal consultant who played a significant role in organizational and leadership development within a large organization. He was perceived as an expert in

his field and according to feedback he was performing well. Despite this Hugh expresses his curiosity about other ways of doing his work:

“...I had this personal sense of unease - how do I know this is right? I want to go and mix with some people who are doing this - to just get challenged and get a sense of is what I’m doing, is it good, is it good work, is there another way? I had this vague belief that there was another way to do this, and that in fact the work that I was doing might be done better.” (Hugh, 2005)

Hugh searches for new ideas to inform his practice, but becomes outraged when the Programme Director challenges his change management methodology during an introductory workshop:

“Are you prepared to come on a programme and challenge the thinking behind this and challenge even whether it works? And I remember feeling quite offended by this and I remember driving away, my knuckles were white on the steering wheel – how dare these people, how dare they challenge me on if our methodology works. And, of course, the methodology is very mechanistic and it’s a bit like a sausage machine, it has its foundations in John Kotter and the book of leading change in which he refers to step-by-step organisation change.” (Hugh, 2005)

Hugh acknowledges the mechanistic nature of the change management methodology which he introduced into his organisation as a result of studying with “Harvard-type” academics. Despite his initial rage, Hugh engages with the learning process to challenge and release his old ways of thinking, absorb new ideas and then re-integrate the two together:

“You know there’s a thing that I think the people here on the Faculty call reintegration and I think that if you were to talk to them about me they would say that I’ve been through the classic process that you go through on this programme

where you reject everything that you've held on to because you are soaking up Ralph Stacey, Patricia Shaw and all this stuff, and towards the end, hopefully – for me it was towards the end, I started to reintegrate.” (Hugh, 2005)

Initially Hugh gives no indication that this has been an emotional experience, talking instead in positive terms about his sense of personal change:

“But I've got to say that at the end as I walk away from this programme there's been a paradigm shift for me which is that my world view has changed and that's an incredibly profound experience to go through. I think in any walk of life to have a totally changed belief in how organisations work, how the world works, the benefit of us having a conversation, the beauty of a conversation.” (Hugh, 2005)

With a sense of delight and enthrallment Hugh refers to a significant change in the way he understands organisations, his role and “the way the world works”. He reiterates these changes in subsequent comment:

“When I talk about a paradigm shift I mean in quite simple ways but also in very profound ways; you know, the way the world works and my place and my role in it.” (Hugh, 2005)

Taken together these illustrations provide a convincing description of a change in Hugh's meaning perspective. So where are the intense emotions predicted by Mezirow (2000)? Hugh subsequently talks about the more turbulent and emotional aspects of the learning process in which he developed deeper insights into himself and his core beliefs:

*Researcher: Would you say you've enjoyed the programme?*

“The answer to that is yes, I have, but there have been parts of it which have been ... well, let me put it this way, I don't think you can always enjoy a change to your world view and being jolted and being challenged. So I think in a year's

time I'll say that was a life-changing experience. I can't say I could use the word 'enjoy' all the time." (Hugh, 2005)

Hugh elaborates further, describing a learning event during which he becomes very emotional although the reasons for this remain a mystery:

"It's been turbulent at times and I had one experience with a member of the Faculty – we get on fine now – but when we were out in the grounds somewhere yelling at each other, which was an unusual experience." (Hugh, 2005)

Finally Hugh illustrates in much greater detail the type of learning process he has been through and conveys his sense of fear, at being forced to 'look deeper for longer':

"I believe that what this programme has done to me is what I call 'forced reflection' and it reminds me of this – if someone asks you to hold your breath under water and I'll time you and you get to a certain period, if I hold your head under for 10 seconds longer than you manage to do, then you'll go through a longer period. I use that metaphor for forced reflection because I used to think yes, I reflect, and I did but it was always superficial reflection." (Hugh, 2005)

Despite these disturbing experiences, Hugh describes feeling much better as a result of his learning experiences:

"...so it has had a tremendous calming effect on me." (Hugh, 2005)

Hugh describes acquiring a sense of calmness which other people notice, instead of the frustration and anger which previously typified his work:

"Coming here has had a remarkable effect on me because I started to keep a journal, which is in my bag, and when I flick through and look at my journal I use the word 'calm' a lot, so <business school> and <programme name> has had a calming effect on me.....and I used to have a lot of irritation and angst." (Hugh, 2005)

This outcome is noticeably different to the predictions of cynicism, isolation and disillusionment forecast within the literature hence this is one of several new findings discussed in detail in Chapter 7.

### **6.2.1.2 Ian**

Ian was a senior manager responsible for strategy in a large organisation. He was developing an interest in complexity theory and alternative perspectives on leadership and organisations, so following a discussion with his line manager about career moves he decided to undertake a Masters programme to support his personal development. Towards the beginning of the programme, Ian describes experiencing a massive shock, as his existing ways of thinking are subjected to subtle but searching questions:

“...and it was incredibly traumatic in terms of okay I had started to enquire into this alternative world of how organisations may operate but one thing I had never appreciated until I got to <business school> was that organisations are about people, and that might sound completely bonkers but I remember sitting there in the very first workshop and there’s a guy who is now in my dissertation support group – I described my story and I said I’m a management consultant, this is what I did, etc., I was doing process consulting and restructuring, and designing, and functional this, etc. Then he said that’s really interesting, but I’ve had quite a different background from you. I’ve always worked with people. He didn’t say it in a critical way at all. It was just that was his view of the world. I stopped and I thought that was the first time I’ve realised that I work with people. Okay, you know that you work with people but it was the first time I stopped and thought actually all my work’s been about people and I’d never realised that. So there was a complete epiphany right at the beginning and it took me some time – I guess my whole enquiry has been around all of the personal, and very very personal for me, which is a complete shift from where I started.” (Ian, 2005)

Ian uses the word *epiphany* to describe the sudden profound change in his understanding, as he discovers that organisations and his work are all about people. This revelation seems rather obvious but when Ian says ‘I’d never realised that’ he makes it clear that this is a new way of thinking, contrary to his previous perspective.

In another example, Ian talks in terms similar to Hugh about challenging his old ways of thinking, absorbing new ideas and integrating the two together:

“Whereas before I was fairly wedded to a particular way of thinking and complexity theory was out here, and it wasn’t really part of me, it was kind of interesting, through the programme I shifted that way and I got immersed in well, it’s all got to be conversations, and everything’s got to be informal and no tasks, and that was out there. I think now first of all I’ve got more integrated, so I think I’m able to say that and that, put them together and create something new and that’s better than that or that.” (Ian, 2005)

When Ian is asked to elaborate on the range of emotions that he has experienced as a result of his learning, especially anything which troubled or challenged him, he gives a defensive answer after which he immediately changes the subject and begins talking about an event at work.

“I can’t really think about the programme and the reason I can’t think about the programme is because I think I was doing a lot of suppressing when I was on the programme.” (Ian, 2005)

However, without prompting Ian volunteers information about the painful cycles of reflection that he has been experiencing and is still experiencing as he concludes his dissertation:

“...so I know that I am going to end my dissertation and at some level the very deep cycles of enquiry that I have been through will end because I won’t need to

do that so it has been quite a ... it's been very painful, reflecting, so why would I want to force myself through that pain if I don't have to do it." (Ian, 2005)

This is immediately followed by an expression of his appreciation and enjoyment in the learning process, resulting in him signing up for another Masters programme:

"...and I know why I've done that because part of me is saying this has been such a tremendous process the last two years." (Ian, 2005)

Finally, Ian reveals the intense emotions and challenges which he has endured as a result of the learning experience. He does this in a second-hand way when responding to a question about whether he would recommend the programme to a colleague:

"...if they were considering this with a number of other programmes, share with them some of the anxieties that were provoked through <business school>. Not that that is necessarily a bad thing. I didn't realise it was going to be that difficult in terms of becoming more self-aware equalling pain and torture. And I would do the whole thing again, so it has been an incredible journey.....If this person was going into it I would just let them consider that it is going to be painful. Why? Because it is fundamentally challenging some of the basic assumptions that we hold about our organisations, about ourselves, and that is really difficult." (Ian, 2005)

Ian clearly values the learning experience saying 'I would do the whole thing again' but he associates 'pain and torture' with some aspects of the process suggesting that they were deeply uncomfortable and emotionally distressing.

### **6.2.1.3 Amy**

Amy had a successful career in a large organisation having risen through the ranks to become a senior manager. Having been with her employer for nearly 20 years Amy describes being concerned about translating her experience into a qualification in case

she decides to leave. She subsequently talks about personal development being her real motivation for doing the programme! Amy recalls entering the programme “very naively and optimistically” but this rapidly evaporates as she begins to encounter unfamiliar ideas:

“I went into a bit cocky if you like, thinking I am a leader, I am a manager, so I’m going to know what it’s all about. I very quickly realised that wasn’t the case.” (Amy, 2005)

Following this initial shock Amy recalls the emotional highs and lows which she has experienced throughout her turbulent voyage of self-discovery:

“It has been – I am not going to use the word ‘rollercoaster’ because that is such a cliché – but it has literally been the most enjoyable, most horrendous, most challenging, most brilliant thing I have done, and I have absolutely loved it and hated it in equal measure, and gone from ‘can’t wait to get shot of it and never do anything else ever in my life to do with academic qualifications’, to almost thinking ‘what am I going to do with my life after this?’” (Amy, 2005)

When asked to describe specific points along this learning journey in order to identify what has changed, she responds by talking about “plumbing the depths” in order to understand herself, her actions and her impact on colleagues. This has clearly been a painful process:

“...I really felt that I had to plumb the depths of my own leadership and management understanding to understand how my actions affect myself and other people. I really had some painful moments by recognising some of my behavioural tendencies and how that can affect different people.” (Amy, 2005)

The behavioural tendencies which Amy refers to, relate to her self-confessed need for control. She describes this as a natural tendency which has been intensified by her working role and organisational context:

“I can give you one example and it is a recurring theme throughout my learning log, and that is my need for control. That is probably the reason why I have stayed so comfortably as a <role> for 18 years because being a <role> it is a very controlling, conditioning, structured atmosphere and I am a very structured, organised person. I think that has exacerbated my natural behavioural tendencies for a need for control. There has been some slapping faces along the way of recognising that.” (Amy, 2005)

The “slapping of faces” indicates that Amy has woken up to new insights into her behaviour. This gives Amy the ability to reflect on her patterns of behaviour in a way which generates a deeper understanding of her needs and deep-seated insecurity:

“...you know when you read something and you think “Oh my God, that’s me” – he writes about controlling tendencies and the fact that when you are very controlling you tend to provide answers for people which you interpret as good leadership or management because you are helping people but in actual fact subconsciously you are creating dependencies on people and then it is like a recurring status thing because then you feel needed and valued. That is me – I really recognise myself in that.....I never would have come to that conclusion if I hadn’t been doing this <masters>.” (Amy, 2005)

Amy experiments with a less controlling approach at work but this generates a deep sense of despair for her during the second year of her masters:

“Around November 04 and February this year I completely lost interest in the <masters> – I was within a whisker of giving it up and I spent weeks, not crying but whingeing – I don’t want to do it, what’s it all for, what’s it all about, I am not going to learn anything else, and I really just didn’t want to go forward and felt as if I was in a black hole. I think it was the thought of all that structure and

control in organisation ahead of me, and it was something that at the time I was really trying to kick against and not do it.” (Amy, 2005)

Here Amy describes her feelings of hopelessness, despair and exasperation as she endeavours to behave contrary to the expectations she perceives within her employing organisation. This was one of several triggers for Amy’s turbulent emotions. In another example she describes feeling sad and insecure following critical feedback on an early essay:

“...the way he delivered it and the way I received it completely shattered me – I cried for about 3 days solid. I just went into such a despair. I think it brought up all these feelings of failure, and I am not good enough to do this.” (Amy, 2005)

However, Amy’s desolate moments are balanced by the delight and satisfaction which she talks about in relation to subsequent assignments “when I got my first distinction it was quite wonderful”, learning events in which the lecturer was “just amazing – our jaws dropped to the ground” and the programme overall:

“I have had some really fundamental learning experiences doing the <masters>, and I am really glad I have.” (Amy, 2005)

In addition to challenging her thinking on managerial behaviour, Amy also talks about reviewing her goal orientations, particularly in relation to her work and career:

“I really tried to work on accepting me as me, and not trying to be this – I am a super manager, I am a super leader, I can do any job, I can be the best wife in the world, and the best aunty, and all these kind of things.” (Amy, 2005)

“It has helped me understand the true importances in my life, where did I get my energy from and was it different things that was draining my energy because I was on this path of control and status.” (Amy, 2005)

Not only does Amy talk about having different career aspirations, she acts on these to secure a different and far more enjoyable role for herself within her organisation. She describes the net result of this and her learning experiences in very positive terms:

“It is a different feeling, and one that is unusual and it is a calming feeling.”

(Amy, 2005)

## **6.2.2 Dismantling**

The three research subjects featured previously talk about emotionally intense but mainly positive transformative learning experiences. However, the next set of findings paint a very different picture for one research subject who experienced intense emotions and challenges but for whom the outcomes were less positive.

### **6.2.2.1 Dave**

Dave enjoyed a successful career spanning more than 20 years in a large organisation. Having left a few years ago he secured alternative employment but soon began searching for something else. Dave’s lack of formal qualifications was a disadvantage and following several job applications, rejections and bereavement, Dave recalls his confusion and hurt as he approaches what he terms “a mid-life crisis”. Inspired by a short course Dave decides to undertake a Masters qualification both as a “spiritual search” and a “career move” aiming to establish himself as a self-employed consultant in leadership development. With hindsight, he concludes that it was not a good time to commence a programme of this type:

“And it wasn’t a good time – it was a good time to start the course but it was a bad time to start the course, and that’s where the contradiction comes in, because I wasn’t emotionally robust, you know.” (Dave, 2005)

Having regarded the course as a foundation for his new career Dave expresses his growing fears as the learning experience generates more questions than answers:

“...there weren’t any jobs anyway, and so my self-esteem was very low before I started the course. The course didn’t help that, the course made it a lot worse. Not only did it make my self-esteem worse.....I suddenly realised in a post-modern sense that actually I never was going to find answers, and that was dreadful. It was very, very frightening.” (Dave, 2005)

Here Dave suggests that aspects of the learning experience raised fundamental challenges to his worldview. As he engages with alternative paradigms, such as post-modern thinking, his basic beliefs appear uprooted and uncertain. Working in a self-employed capacity, Dave is alone a great deal and he recalls how this intensified his doubts and fears:

“I didn’t really know if I can believe anything.....I didn’t know what I stood for, I didn’t know who I was, and anything I could be was questioned, and then because I was on my own a lot, because I didn’t have that mirror of other people and a lot of the work I was doing was on my own, you know,” (Dave, 2005)

Dave’s stress levels continue to rise. He wrestles with existential questions whilst working hard to establish himself as a consultant, and eventually becomes ill for a period in the middle of the programme. Dave works through this depression by paying attention to his physical and mental fitness and by learning to take pleasure in everyday activities rather than constantly analysing his motivations and accomplishments:

“Emotionally where I’m at is I know that if I ever go to a dark place again I know the way to get out of it is to go to bed early, go out and do more fitness, get back on the mountain bike, but positive things that this time when I’m on the mountain

bike I'm not saying I bet there is a bigger hill somewhere, I'm saying this is a great day. So that's the positive." (Dave, 2005)

However, despite the pleasure which Dave takes in getting through this personal crisis, he is resentful about the way it has made him feel:

"I feel I'm not the confident person that I was." (Dave, 2005)

The programme participants were all asked to keep a reflective diary (or learning log) as part of the learning process but Dave describes how he resists doing this fully, partly because it makes him feel worse and partly because he is reluctant to share his thoughts and feelings with the faculty:

"In short I didn't want to write in a diary about my existential angst because it only made me more miserable and I didn't think the faculty needed to know or should know the detail of what I was going through – but I couldn't reflect on things without going down to that level." (Dave, 2005)

"So, I found the learning log massively difficult because it's painful." (Dave, 2005)

However, Dave persists with the reflective diary as he endures a profound dismantling of his worldview and his self-esteem:

"Going back to the learning log, as everything else in life – it's like I dismantle everything and I've put it back together again now and it happens in all our lives repeatedly anyway. It's just that this was a massive dismantling, massive dismantling." (Dave, 2005)

Dave concludes with a warning to other people by expressing his belief in the transformative potential of critical pedagogy but reiterating the danger of embarking on such a venture at a time of personal stress.

### **6.2.3 Transitioning**

Analysis and interpretation of the data suggests that Fiona, Gill and Kim each experienced emotionally turbulent learning experiences but they were not necessarily transformational in the sense of rejecting one perspective and replacing it with another. They described engaging in searching self-enquiry which enabled them to transition into a new level of self-awareness, understanding and confidence.

#### **6.2.3.1 Fiona**

Fiona was a self-employed consultant working on worldwide job evaluation and staff development as part of a long-term contract in a large organisation. She recalls wanting to return to her chosen business school “I did a management course here years ago and I just loved it” with the aim of transitioning into a fully fledged consultant rather than a pretend one:

“...I could say I was a consultant with confidence rather than feeling embarrassed about I’m not a real one, I’m a fraud, just pretending.” (Fiona, 2005)

She gives a succinct but slightly tentative reply when asked what she originally hoped to get out of the programme

“The credibility, the confidence, the contacts, the ability to do the job well I think.” (Fiona, 2005)

As she commences her dissertation, Fiona is very clear about the extent to which she has developed as a person and as a consultant:

“I do feel much more – well, I feel completely different actually.” (Fiona, 2005)

Later, when Fiona describes the application of her learning she provides numerous examples of significant changes in her practice. However, Fiona’s account of her learning process is much less explicit than Amy, Hugh or Ian, offering very few

insights into her emotions, points of learning and challenges as she navigates her way through. Instead Fiona focuses on the experiential learning process, involving group discussions which irritate her but which she acknowledges are central to her personal development:

“...it’s a lot of sitting round in a circle ‘how are we feeling today’ stuff, which at the time can actually be pretty tedious but it does bring out all sorts of stuff about how you are in groups and how you are with people and makes you confront an awful lot of things about yourself which you don’t get on a more traditional programme.” (Fiona, 2005)

The group-work is clearly important to Fiona and she elaborates further on the anxieties and frustrations generated by the process of interacting with the other participants:

“So the sitting round in a circle bit I found very, very difficult and awkward and anxiety-provoking and dull, and I didn’t want to be there. I found it deeply irritating some of the things people said, and some of the things people claimed were happening that weren’t happening as far as I was concerned, and the fact that when I said this everyone ignored me.” (Fiona, 2005)

“In the beginning I found it very, very, very uncomfortable to be in that big group and would go for hours without saying anything and get cross or upset or bored and then towards the end feeling very comfortable with it.” (Fiona, 2005)

As Fiona continues her recollection of this process, she describes feeling annoyed that nothing is ‘happening’ but then she begins to realise that the whole process is giving her insights into how she behaves and feels among a group of people:

“To start with there is this ‘well, of course, we are a fantastic group and we are working really wonderfully together’ which I didn’t feel. What I think I got from it was being able to live with the discomfort and also to understand more about

how I am in a group. I don't know how else you could do it really." (Fiona, 2005)

What is different afterwards is not just Fiona's increased self-awareness but her sense of feeling much more at ease when working with a group of people and this is important to her as a consultant:

"What you do want to understand as a consultant is what am I bringing to it and what effect am I having on people and what effect are they having on me, and how is that affecting what is happening between us. I feel much more comfortable with that now. I'm much more interested in what is going on between people rather than being anxious about it." (Fiona, 2005)

Fiona has learned to feel 'interested in' rather than 'anxious' about interpersonal behaviour and she clearly appreciates this. She attributes her sense of change to this "powerful" experiential learning process which she finds hard to describe but which she values:

"You can go on a lot of courses about group work and read a lot about group work but it's the experiencing it, the stuff that can't be put into words really that feels powerful and I think that's why I find it difficult to talk about it because what do I say about it? All I know is that I went through it and things were different afterwards." (Fiona, 2005)

Having given away very little about her emotions during this process, Fiona finally lets slip that it has been quite painful. Like Ian, she does this in a 'second-hand way' as she talks about whether she would recommend the course to a colleague:

"...being prepared to possibly go through quite a painful process of having to face what they're like and how people experience them," (Fiona, 2005)

### **6.2.3.2 Gill**

Gill was an experienced consultant in the field of organisational development. She was increasingly interested in the whole idea of the reflective practitioner and had been searching for study paths where she could develop these ideas and her practice further. Gill talks about both her work and her personal relationships being in a period of transition. This transition is further enabled during one of the learning events in which Gill empathises with a lecturer who describes loosening the connections between her identity and her work. Gill recognises herself in this story:

“I suppose - there is some transitional stuff that’s going on for me. I feel something’s emerging but it still feels – I have this image of shedding an old overcoat and you know being able to stay with that vulnerability in a way.” (Gill, 2005)

Despite this feeling of vulnerability, Gill talks in very positive terms about the programme’s curriculum and the ways in which it has enabled her to re-assess her assumptions and beliefs:

“I feel it was a very well-rounded course and I felt it was – I mean in terms of basic kinds of constructs, concepts, social construction, complexity, enquiry, dialogue, the contextual thing is very important for me.” (Gill, 2005)

Furthermore, Gill appears to relish the introspection, challenges and concepts which the course has involved:

“I think it did well to bring a more enquiring mind, a curiosity and ability to challenge my own assumptions and beliefs – I think some of the conceptual rigour was good. I think the ability to, yeah, to see things differently, to ask questions differently,” (Gill, 2005)

However, whilst Gill values the process she also alludes to having trouble with some of the group-work, particularly her sense of isolation which is a recurring feature in her account:

“...if I hadn’t had <tutor> and I think because I had the difficult experience with my <action learning group> I think it would have been quite a different experience for me and I think finding my place in the group was a constant kind of question for me which is a deeper question about belonging.” (Gill, 2005)

“It’s quite at times, it felt a bit heavy at times...” (Gill, 2005)

As a follow-up to Gill’s comment that she is finding the course ‘a bit heavy at times’ she is asked which parts of the programme she found challenging or troubling. Gill chooses to reply with a story about feeling like an outsider “I can’t afford to stay I’ll go to the B&B down the road” because of being self-financing, and how she feels disappointed by the way some of her fellow participants ‘pigeon-holed’ her during a module on sustainability, which she really enjoyed. Reflecting on this Gill wonders whether her own concerns about whether she would ‘fit in’ might have set up this group-dynamic. With this new insight, Gill converts the situation into a learning experience:

“...but I kind of reminded myself that this is also about handling difference and being able to really challenge some of my own assumptions and judgements.

That’s part of the process really.” (Gill, 2005)

Gills navigates her way through these learning experiences, working with the whole interplay going on between her personal and spiritual “inward journey” and “the outward journey, my practice”. She finds this tough but developmental:

“At times it’s been really quite challenging and you know hard going.” (Gill, 2005)

Central to Gill's development is her increased self-awareness through which she learns to trust and to value her own feelings and judgements:

"I've noticed what I bring is that more intuitive capacity, I think the relational and actually giving more value to that rather than oh, because she's a woman she's kind of good at the more fluffy side. Actually that is kind of core to my practice, and that ability to relate, that ability to really trust your intuition and to access that. So I think bringing more of myself, bringing more of myself into what I do I think is part of it." (Gill, 2005)

As the programme approaches its conclusion, Gill feels the need give herself a break from all of her self-imposed expectations. She describes this as a positive choice rather than an escape route:

"...so the course has also thrown that up for me and meant that I've actually needed to take a year out but I feel that I've come to quite a healthy place really rather than "I wasn't coping". I was being responsible and I feel in many ways it is more about how I approach my life more generally, and less kind of driven, got to get it right and got to try harder so much." (Gill, 2005)

Reflecting on whether she would recommend the programme to a colleague, Gill offers a warning by referring once again to challenging her assumptions:

"I think, really be prepared to be stretched, be prepared to have your kind of assumptions about yourself and your practice challenged." (Gill, 2005)

Despite these challenges, Gill talks passionately about how the course materials, particularly those relating to complexity and change, have given her a new and firm foundation on which her practice can flourish. She uses an inspirational metaphor to describe this, suggesting that she has transitioned to a very positive point in her career:

"Yes, I've found my rock to sing my song from!" (Gill, 2005)

### 6.2.3.3 Kim

Kim was a senior manager in a large organisation. She talks about feeling isolated, under-valued and something of a misfit in her organisation partly because she prefers to work in a way which is different to other colleagues in similar roles. Eventually Kim decides to do her Masters in order to deal with “a transition point in my life and I needed to get my head straight”. As Kim constructs the account of her learning experience she talks with passion and pride about learning to value who she is and what she can do. Having previously strived to prove herself, Kim outlines in 2005 how she feels completely different:

“It is a very grounding experience when you suddenly realise what your capabilities are and that other people value them not because they can give other things to other people but because they are who you are.” (Kim, 2005)

Rigorous self-examination supported by her tutor enables Kim to develop significant self-awareness. Kim is joyful about this and she contrasts it with the sense of isolation she was experiencing prior to the programme:

“That awareness thing has been huge - awareness of my staff, awareness of other people. I always have been instinctively very aware of what’s going on but I’m more considerable of the knowledge now, of that awareness, more gentle with myself, more considerate of other people and how I interact with other people .....For me the value of that is being able to relate that to other people. I was very, very isolated before I joined <business school>, hugely isolated.” (Kim, 2005)

It seems that Kim has engaged in searching self-examination in order to overcome her anxieties and sense of isolation. She has found this difficult and frightening but she is appreciative of the process and its outcomes:

“So this has helped me to recognise the things that held me back, the things that were in me, the things that made me anxious for a very, very long time. I knew they were there but I’ve never ??? and I’ve gone there and it’s been fine. It’s been hard work, it’s been scary, all of those things but I’ve had massive support from my tutors,” (Kim, 2005)

Kim praises her tutor and then briefly refers to herself as “falling apart” but quickly corrects this:

“He’s ruthlessly honest, which I needed but he is also hugely compassionate and very skilled as a counsellor so he has this balance between the two so when he was pushing me too hard or when I was falling apart, I never fell apart which I thought I would, but I didn’t. That’s what I was worried about.” (Kim, 2005)

There is a hint in this illustration that Kim feared she would ‘fall apart’ and that she may have come close to an emotional breakdown but avoided this thanks to her tutor’s skill. Kim describes the process in detail as her tutor helps her to ‘peel away the onion layers’ in order to understand her character, assumptions and behaviours:

“<Tutor> and others have helped me to very gently un-package some of those things, deconstruct some of my constructions and work out what’s really going on and then deconstruct it again, and deconstruct it again – it’s an ongoing process. So becoming more of who I am and being okay with that, and liking who I am and recognising that there are bits of myself I don’t like, and I wish I wasn’t like that but actually I am so okay we’ll have to think about how that works.” (Kim, 2005)

For Kim the outcomes of this process are positive and she talks joyfully about how she now feels:

“I am not as anxious. I am not as worried. I am happier.....”

“I think who I am is around being more of who I am. I haven’t changed into somebody else but I’m much clearer, I’m much more confident and proud, I guess, of who I am, and that’s okay.” (Kim, 2005)

She follows this with a resounding expression of her new self-confidence and self-esteem alongside a re-appraisal of her personal goals:

“I’m not afraid anymore to say that I’m a very capable person and I do a very good job and I think that I’ve got more to offer. But I don’t want to do that just to earn more money. I earn a lot of money and I’m quite happy with that but I don’t want to keep feeling ‘that’s okay’. But equally I don’t want to just be working to earn money. I want to do something valuable.” (Kim, 2005)

What’s more, she believes that the learning process has helped her to understand why she had previously been focusing on ideas and concepts whilst becoming very anxious about the inter-personal aspects of her work:

“I was very much in this conceptual world because it was much less scary than dealing with the people stuff, and also much less scary than dealing with the practical and doing because things can go really wrong when you do that, and it can reflect back on you and people will be upset with me, which I realise now I was very anxious about – people not liking me or being upset, and I took things very, very personally. There were all sorts of reasons why that is and I explored them.” (Kim, 2005)

However, to Kim’s delight this has now been resolved:

“I find much more joy in meeting new people than I had – I had come to a place where I didn’t enjoy that.” (Kim, 2005)

This is truly liberating for Kim but in order to win her freedom she has had to deal with her innermost demons. She illustrates this in her warning for anyone considering taking a similar course:

“I would say how willing are you to open Pandora’s Box and be absolutely open to whatever comes out, and if they were willing to do that then go on the course.”

(Kim, 2005)

## **6.2.4 Broadening**

Analysis and interpretation of the interviews undertaken in 2005, suggests that the five remaining research subjects, namely Ben, Chris, Edward, James and Lucy, associated mostly positive emotions with their learning experiences. Their rare references to troubling emotions typically relate to external factors such as stressful workloads rather than emotions generated by the learning itself. Descriptions of changes in their frames of reference are almost totally absent and instead they describe resisting self-reflection and several expressed concerns for fellow learners who they witnessed engaging in this. None of these research subjects talked about significant changes in their practice as illustrated later in Section 6.3, and instead their learning appears to include mainly development of skills, such as critical thinking, and a broadening of their knowledge base.

### **6.2.4.1 James**

In 2003 James was a senior internal consultant responsible for a team of consultants and leadership development within a large international organisation. James was seeking personal and professional development so he looked for a Masters programme that would inform his thinking and further develop his practice. James talks in positive terms about his learning experiences, referring to very few emotions along the way. He expresses his appreciation for what the programme offers in terms of developing reflective practice and how this “proves that you are being challenged” but provides no insights into how this is affecting him personally. He describes using a

reflective journal, but aside from getting frustrated with the process, he does not reveal the impact this is having on him:

“I think the programme has helped me to be reflective and to write about that.....It’s also been extremely challenging to do that – sit down there and start a journal and writing about what I notice, and what do I notice about what I notice – you go crazy.” (James, 2005)

On several occasions James refers to “being challenged” and when asked to elaborate on this he responds by referring to new insights into different schools of thought and their origins. This and other examples suggest that James engages with the programme intellectually rather than emotionally and personally, seemingly resisting searching self-enquiry and avoiding extreme emotions:

“I think that’s been very interesting and I think many of the things that in the past when I thought about what’s happening in <organisation> how come the people think the way - of course now I have an understanding about the tradition you come from so that has actually been quite an important process to somehow be more grounded around different schools of thought.” (James, 2005)

James is pressed to explain whether or not he has changed his thinking in relation to his practice. Initially he responds in the affirmative but then he appears to backtrack.

*Researcher: Have your own views changed on your organisation and your role in it?*

“Yes. I don’t know if I have fundamentally changed as a person, and the way I look at things. I think what has changed or what has emerged is for me a more clear understanding about what it is that I know, what it is that I understand, how it is that I understand myself.” (James, 2005)

In another example, James describes developing an interest in social construction, appreciative enquiry and complexity theory and how his immersion in these concepts

“comes out in the way you relate to people at work” (James, 2005). However, when asked whether he has changed the way *he* relates to people at work, he is rather tentative in his reply:

“Of course, many of these things I fully understand the perspectives after reading more and more. Of course, I can start explaining and putting my words about how I understand these theories but whether I am at a level where I have fully embodied it and when I go out the door and the way I engage with people is different, I don’t think so. I don’t think I’m where I can really say that the way I engage with people is based on another way of thinking.” (James, 2005)

When asked whether he would recommend the programme to colleagues James demonstrates his understanding of the process of perspective transformation,

“I could imagine that there would be quite a lot of people also leaving their company actually because it’s challenging in the way that it turns everything else upside down, who you are as a person, how you understand yourself, what am I doing.” (James, 2005)

James describes seeing fellow participants go through this difficult process, and being concerned for their well-being, but says he has not been troubled personally:

“Because many have said I don’t want to go into that. I just can’t go on asking these questions, even though it is developmental, it is also extremely hard. I have a feeling that some have felt that it has opened up doors that they are not absolutely sure they would like to go into.”

*Researcher: Do you feel that way?*

“No, I don’t think so. I think it’s been okay...” (James, 2005)

It is possible that James has engaged with the learning but was not troubled, or alternatively he has avoided ‘opening the doors’ into his personal frames of reference.

The latter seems more likely given his earlier comments about not yet embodying changes in his practice.

#### **6.2.4.2 Chris**

Chris worked in a senior position in a large organisation and was invited to participate in the programme by his employer. During the interview in 2005 Chris talks about the programme enabling him to challenge both self-imposed and organisational constraints on his thinking:

“Yes. But what it did was to make me understand the futility of some of the restrictions you impose on yourself and the way you think. And I had never thought about the reasons and the impact that might have. And so as well as divergent thought and a bit of a philosophical broadening on how and why to do things, it’s made me challenge a lot more of the, especially the prescriptive and doctrinal things that <organisation name> demands...” (Chris, 2005)

Here Chris describes how he is allowing himself to think more broadly but there is no indication that he is challenging and revising his own frames of reference. In fact Chris makes other comments which suggest that he is actively avoiding thinking too deeply because he feels uneasy about the disturbance it might generate:

“Yes, so making that connection, the realisation if you like, that was definitely an aspect from the course that the philosophical side of leadership is quite deadly actually. It’s quite serious. If you’re not careful it can upset the balance in all kinds of things. And I’m sure I haven’t really dealt with it at all. I’ve done what I do quite often with quite a lot of things, I just close them off and pretend they’re not there and come back to it another time, and think well, that’s just too difficult for me.” (Chris 2005)

Consistent with his avoidance of searching self-enquiry, Chris describes how he relies on his wife as a source of reflection on his behaviour. When Chris describes how he feels about his learning journey he only expresses one negative emotion and this relates to his initial apprehension about "...not really know what it's going to take to pass". Instead Chris describes the learning journey as a pleasurable experience, in which he enjoys conversing with experienced senior peers and appreciates the trust and humour within the cohort:

"So this is like a guaranteed safe environment where you know anything goes and is important, no matter how trivial or stupid it might sound. Accompanying that is a real familiarity and the sense of humour actually that I really love."

(Chris, 2005)

#### **6.2.4.3 Edward**

Edward was a senior manager in a large organisation in 2003, with responsibility for a team of around 70 people. Edward had decided that he might want to leave the organisation and felt that a Masters degree would open doors and provide confidence and credibility. Having not been to university before, he was nervous about his ability to cope with the academic demands. Despite this, Edward talks enthusiastically about the programme which he portrays as "absolutely fascinating and thoroughly absorbing." When asked which parts of the programme he particularly enjoyed Edward initially talks about developing his self-awareness:

"The self-awareness bits. I do have this deep-rooted interest in self awareness and anything that we have done that has involved exposing me to reflecting on myself, and there has been a lot of reflection on the course." (Edward, 2005)

Edward does not explain the specific nature of his increased self-awareness and instead he talks about enjoying learning about new perspectives on leadership which enable him to realise the limitations of his pre-existing knowledge:

“And I have also found that leadership isn’t as black and white as I thought it was. Having delivered it for years and taught people how to be a leader through this checklist of John Adair’s circles of need, I now realise that actually that is very narrow,…” (Edward, 2005)

Having been introduced to new ideas, Edward describes periodic drops in his confidence as the limitations of his knowledge are exposed:

“I remember very early on in the course feeling quite confident about my ability as a leader…….But I very soon realised that actually what I knew about leadership was very, very limited and, in fact, one of the points that you raised earlier on about my level of confidence – there were periods during the course when my level of confidence actually dropped significantly.”

*Researcher: Because of?*

“Because of my recognition that actually what I knew wasn’t very much at all. I remember going back to my previous job having come back from one particular week thinking I’m a bit of a fraud here telling people about leadership when actually I don’t really know a lot at all.” (Edward, 2005)

However, Edward describes how he “rationalised the whole thing” in order to restore his confidence and ability to undertake his role:

“This awareness now that you don’t know as much as you thought you knew shouldn’t be a reason to be less confident about your ability. Your ability is still there, you just now know that there is more to know.” (Edward, 2005)

Edwards provides only one other example of negative emotions triggered by the learning process and this seems to emanate from a very theoretical module:

“...at one stage some of us were questioning the value of this academic knowledge and whether that is actually helping or hindering, particularly when you lose confidence. And does it matter? Why are we getting so upset or so concerned about this academic stuff....” (Edward, 2005)

When asked about learning to reflect and what reflection means to him, Edward says:

“Reflection to me is finding the time to actually sit back and look at something and just ask yourself why that happened and indeed, what happened, and just look at it a bit more deeply.” (Edward, 2005)

Edward’s response suggests that he was not necessarily learning to engage in *critical reflection* but was instead describing *content reflection*, as practiced in experiential learning (Kolb, 1984). Content reflection focuses on problem solving including taking action and reflecting on the consequences, whereas critical reflection involves asking searching questions in order to surface values, interests, and preconceptions (Reynolds and Vince, 2004a). So, when Edward is asked whether anything on the programme has been difficult or troubling he replies:

“I can’t think of anything really – no, I can’t think of anything where I was troubled. I was challenged throughout – academically I was challenged. I was always learning new things about myself.” (Edward, 2005)

And then when he elaborates on what he means here by “challenged” he says:

“Just challenged my way of thinking I think and just made me open my eyes to other ways instead of me thinking I was right.” (Edward, 2005)

So, despite the temporary fall in his confidence Edward emerges from the programme feeling relaxed, confident and content:

“I feel much better as a person. I feel much more relaxed and confident about myself and about what I have to offer, and also my limitations.” (Edward, 2005)

#### **6.2.4.4 Ben**

Ben was a senior manager in a large organisation. He had many years of experience but no post-school qualification hence he was thinking about translating his experience into a qualification in case he decided to leave. Ben was interested in leadership development and this was supported by his employer who had identified him as a future leader. Ben describes feeling fearful at the outset of the programme because he is concerned about whether he will cope with the academic assessments. Ben's anxieties re-surface when he gets behind on some of the assignments and feels overloaded by the combined demands of his job and his studies:

“I wouldn't say I was stressed, I use the word stressed because I wasn't particularly worried about it, but I had got myself into a bit of a stew because I kept thinking about what I was going to do dissertation-wise, and the assignments outstanding, plus because my brain was trying to take so much new information in because the 3 sites I am responsible for now are totally different from what we are doing down here, that my brain was getting overloaded. I didn't realise how tired I was.” (Ben, 2005)

This tiredness and stress results in Ben losing enthusiasm for his work, and this generates even more concerns for him because he feels that this is out of character:

“I have found it difficult.....my enthusiasm for the job did go in the first quarter. I think that's perhaps what stressed me more than anything because that's not me to lose that enthusiasm.” (Ben, 2005)

With high personal standards, and limited time available for study, the challenge of writing essays is a key source of frustration and disappointment for Ben:

“I have probably put myself under undue stress because I have high standards as well. I have had to accept work that I'm not happy with but I can't keep going on forever. That was a difficult thing.” (Ben, 2005)

However, despite these difficulties, Ben speaks in very warm and positive terms about the majority of his learning experience. Here are selected examples of Ben's delight, enthralment and amazement as he recalls learning events in which he encounters new experiences and ideas:

“In the first week there was obviously some consultancy type of stuff, which was fascinating...” (Ben, 2005)

“We had that week at <venue> and that week was just fantastic – suddenly it just opened our imaginations and our minds.” (Ben, 2005)

“We had to do an exercise.....We were in a total mess. It was a fascinating.

Ben describes being introduced to new ideas and bodies of literature, which are a source of fascination and delight for him:

“It is fantastic. For my dissertation proposal, just being able to type in a word like “ethics” or “leadership journal” – there is just so much.....It wasn't like anything I have done before. I have just read, and read and read.” (Ben, 2005)

His breadth of reading also leads him to ponder alternative ways of thinking and of conceiving of the world:

“So that has been a huge ability to really read, and certainly from a philosophical point of view it has blown all of our minds away.” (Ben, 2005)

However, Ben gives no indication that this causes him to change his own worldview, instead describing how he has opened his mind to a broader range of perspectives:

“So with regard to my confidence from a personal development point of view I am just so much more worldly.” (Ben, 2005)

Ben appears to be fearful about engaging in self-reflection. He describes understanding the importance of being more reflective but when he is asked to explain what this means for him, Ben gives reasons for not doing it:

“You actually start thinking about yourself – analysing yourself a little bit too much.....he was saying that people with emotional intelligence don’t necessarily get underneath, they don’t ask the difficult questions. That’s myself.”

(Ben, 2005)

#### **6.2.4.5 Lucy**

Lucy had been working on a freelance basis for many years developing corporate communication and training programmes when she described looking around for a Masters programme as a source of intellectual stimulation. When Lucy outlines her reasons for wanting to do her chosen Masters, she does so in a humorous manner saying “it was to learn that stuff that I had seen consultants do”. Lucy’s light-hearted account possibly disguises a more serious search for credibility and a yearning to develop her practice:

“I guess something that would kind of help me get into the heads of my clients a bit more and talk the kind of talk that they talk in organisations.” (Lucy, 2005)

Despite the fact that Lucy describes wanting to get into the heads of her clients, her comments indicate that she is not willing to let the programme faculty get into her head! This revelation emerges as she responds to questions about whether any of her learning experiences have been troubling in any way:

“No, I don’t think so. But I witnessed a lot of other people being troubled and um - but I didn’t, not at all.” (Lucy, 2005)

As the conversation develops, Lucy expresses scepticism about a learning process which involves so much introspection. She positions herself outside of the process:

“I think they kind of play games with people.”

*Researcher: Play games?*

“Yes. I felt that a little bit. They kind of dig in and try and get to the heart of stuff and I’ve seen people get very, very upset over it and I don’t think, I mean I don’t think it’s the best way to learn.” (Lucy, 2005)

To further illustrate her concerns, Lucy describes a difficult situation which occurs during one of the small-group tutor-led session. Lucy’s language in relation to this episode provides an indication of the depth of emotion which it arouses in her:

“But it ended up we were half way during the year with the tutor screaming at this guy.....It was dreadful and it was very damaging for the other girl, it was very damaging for him and for the tutor. <Business school> kind of encourages that, I feel, a little bit, and it’s very dangerous. Messing around with people like that.”

*Researcher: But for yourself ...*

“I didn’t open my mouth. I thought I’m not going to let them fuck with my head. Some people would say it was wonderful, and they really appreciated that but for me personally that’s not how I want to learn.” (Lucy, 2005)

Lucy is clearly reluctant to engage in this type of learning and deliberately stays in the background. She also feels removed from other aspects of the learning process, for example, she expresses her surprise and confusion as the faculty invite programme participants to re-assess the models which inform their work:

“The bigger surprise to me was when we started in <name of business school> they always say to you now you have to forget all the models you’ve learned, and you’ve got to hold all this stuff very lightly – I don’t have anything to hold – so I was quite confused for a long time about the um - They were constantly referring to the models that we were used to using, this way of working, that way of

working, and I thought well - my only way of working is kind of making it up.”

(Lucy, 2005)

Lucy also describes feeling confused when faculty present various ideas as ‘new’ when she regards them as common sense and similar to her own practice. She is bemused by the reactions of some of her fellow programme participants who are experiencing challenges to their perspectives:

“...they were constantly presenting stuff as being the new way of doing things, the radical approach, and I would think ‘what’s radical about that’. You know all this stuff about dialogue and conversation, what’s so radical about that?..... and I remember some people on the course being really surprised and saying things like ‘oh, I’ve held so tight, dearly to this model, it’s served me well and I don’t think we can just go into meetings and not have agendas’. I was thinking - what kind of places do these people work in?” (Lucy, 2005)

The ‘radical’ approach promoted on the programme, involves a focus on people, relationships and conversations, and Lucy claims this is consistent with her existing practice.

“And I think a lot of people worked in quite a mechanistic way where you would say ‘do X then Y will happen’ you know, sort of cause and effect and I guess I just never really thought like that. So therefore when I was introduced to things like complexity theory and all that kind of stuff, it didn’t fundamentally change the way I did things.” (Lucy, 2005)

However, despite her confusion there are some areas of learning which Lucy regards as both enjoyable and valuable. In the following illustration Lucy expresses her excitement about acquiring a new language which enables her to ‘name’ many of her existing practices:

“For me I guess some of it was around the theory, so being introduced to things like social construction – ah, that makes sense – and the whole thing around metaphors and language, I found that extremely useful because of course I work with words so it certainly gave me a whole new way of talking to clients.....that whole idea that you’re constructing things as you’re talking and in conversation, which was what I was doing but I wasn’t able to name it. So now I can actually name it to clients and that’s tremendous.” (Lucy, 2005)

Lucy’s account in 2005 appears to have similarity with Kim’s in that she talks about her existing practices being confirmed, informed and enhanced. However, in 2007 when Lucy looks back on her learning experience, she gives a very different impression. Here she is portraying herself as completely out of her depth:

“During the Masters I just felt as if I was at rock bottom, not knowing anything about OD, never having heard of any theories or models, and so in what felt like a sink or swim situations I sort of grabbed a life raft and floating along.” (Lucy, 2007)

Lucy is the only research subject to provide contradictory accounts in the interviews undertaken in 2005 and 2007 and this is why an extract from her 2007 interview has been included in this section.

### **6.3 Application at work**

These findings present the research subjects’ descriptions of their application of learning in the workplace, addressing three of the refined research questions, namely:

- b) What emotions do they associate with their transfer of learning into the workplace?
- d) What changes in practice do they attribute to their learning experience?
- e) What reactions from colleagues do they describe experiencing?

Findings relating to question (b) have been derived from the interview transcripts via the expressed emotions labelled EWD (Emotions Work – During programme) and EWA (Emotions Work – After programme). Every effort had been made to distinguish between expressed emotions relating to pre-existing work situations (e.g. frustration with line manager) and those relating to application of learning. The findings for questions (d) and (e) have been derived from the coding categories in Appendix F labelled *Application – changes in practice*, and *Application – approach and response*.

Hugh's account during the interviews in 2005 and 2007 stands out as a vivid example of an experienced management practitioner illustrating how his practice has been transformed by a profound learning experience. This provides a rich illustration of transformative learning so Hugh's experiences are presented first in Section 6.3.1 an individual case study. This is followed by a second individual case study for Kim in Section 6.3.2. Kim has been featured because her portrayal of her post-Masters practice has characteristics very similar to Hugh's, but unlike Hugh, her journey to this point has not been via perspective transformation. Instead Kim describes how her natural instincts, abilities and preferred practices have been confirmed and informed by her learning experience and thereby liberated from both external expectations and internal issues. These illustrative case studies, one male and one female, beginning in different places but converge toward common ground, provide valuable examples to support the discussion in Chapters 7 and 8. These case studies also generate several themes which are used as an organising framework for the presentation of findings in Section 6.3.3 for the other research subjects who reported changing their practice.

The final set of findings in Section 6.3.4 feature examples of new skills and knowledge which the research subjects reported transferring into their practice.

### **6.3.1 Changing the ‘change guru’**

Hugh was an internal consultant within a large organisation, where he was responsible for leadership development. Hugh was regarded as an expert in change management, yet he describes making radical changes to his approach and being successful in persuading others of the benefits of his new working practices. In the account of his learning experience, Hugh describes experiencing a paradigm shift in his understanding of how organisations work, how the world works and his role within it. In 2005 Hugh is very direct about the impact this is having on his practice and yet also slightly restrained about preaching to others:

“I notice in myself a reluctance to be evangelical about this programme, you know, but why is that, because I feel that this programme has changed my life and it has changed my practice.” (Hugh, 2005)

Although Hugh later describes specific changes in his practice, initially he struggles to articulate the nature of what has changed. All he knows is that it is within him:

“I’ve digested something, and that is manifesting itself in my work because my work is done differently now. I’m different. No, I’m not different; it’s just that I am informed.....and that is manifesting itself in a million different ways in my practice. I really mean in a million different ways.” (Hugh, 2005)

Towards the beginning of the interview Hugh recalls the change management methodology which he devised and introduced within his organisation. However, as a result of his learning experience Hugh describes seeing organisations differently and this leads him to reject the rigid processes within this methodology:

“Our change management methodology is a set of steps but within each step there is a set of tools and what I’ve done is I’ve rejected the rigidity of the steps and I kept many of the tools and so when I’m working with a management team I might see an opportunity to use the stakeholder analysis or the vision tool that we have but that’s very much for me now consulting in that moment. In that moment something emerges and I see an opportunity to use a tool outside of the rigidity of the structure.” (Hugh, 2005)

In this application of his learning, Hugh is seeing benefits in adopting a **less controlling** approach to his work replacing it with a blended approach which involves an **intelligent combination of structure and spontaneity**, thinking on his feet and responding with techniques that seem appropriate “in that moment”. Hugh is very subtle about how he handles this with his colleagues, careful not to discredit the original approach which he introduced and which his colleagues adopted enthusiastically:

“So I’ve certainly not discarded it but I am very conscious of one thing. I have to be, and I am, very careful in what I say back home and in my organisation. It’s very important that I don’t come back from <course name> and rubbish something I helped to build and that a lot of people have become passionate about and find a lot of fulfilment from, and they use these tools and they use the methodology. You can’t just go back and say, oh by the way I’ve been to <business school> and now I think that’s rubbish, because that hurts people.” (Hugh, 2005)

It is difficult to know whether Hugh is protecting his own reputation or protecting his colleagues from a direct challenge to their preferred modus operandi, but whatever his motivation, Hugh is being very respectful as he introduces his new practices.

Hugh provides another example of being **less controlling**, this time relating to organising an **unstructured meeting**. Inspired by the complexity approach Hugh organises and facilitates a meeting of senior managers, with no agenda. Prior to the meeting this causes consternation from one of the senior managers, who subsequently concedes that the session is productive:

“...one of the production managers said ‘*Hugh*, I get a bit annoyed by this. We come to this meeting, we going to have a meeting or a workshop or something and we’re going to start at 8.30 and finish at 4.00 and there’s no agenda. You don’t send an agenda. I’m quite a senior manager in this plant and I want to know what I’m being called to’. And I said ‘the problem is that I don’t know what we’re going to talk about’. And he said ‘What?! What do you mean? Surely you have a plan, a recipe, a model’. You know he was asking for a formula, a diagnosis. And I said ‘No. We’re going to have a conversation that will last about an hour to an hour and a half and I’m going to ask each of you for your reflections on what we’ve done since the last time we met and out of those reflections I think something will emerge and then we’ll work with what emerges’. I think if I’d been an external I think I would have been thrown out of the door. At the end of that day we shook hands and said goodbye, and he said I had no idea we would have such a fruitful day without an agenda.” (Hugh, 2005)

In this courageous illustration Hugh shows he willingness to **tolerate a degree of uncertainty and vulnerability** as he **acts into the unknown** with a group of senior people, who expect their time to be used wisely. The outcome of the day is positive and Hugh uses this to opportunity to highlight a point of learning:

“And I said to him, during today you mentioned how dissatisfied you guys are with your management meetings. Do you have an agenda for those? And he said, yes, of course we do. Well, think. Agenda, crap meeting. No agenda, great day. There’s something happening here isn’t there.” (Hugh, 2005)

As Hugh recalls sharing this episode with his manager, he underscores the difference between his new approach and the highly structured methods he used to adopt:

“I’m not saying we should never have an agenda but when I told the story to my boss she said if you could see yourself one and a half years ago the thought of going to a meeting and to lead a management team, and facilitate them, without an agenda. You were so rigid and systemic.” (Hugh, 2005)

Informed by his fresh perspective on the nature of organisations, combined with a complexity approach to change, Hugh learns to value having **conversations with people**. Reflecting on this he notices how organisational conventions influence the perceived value of different activities, with conversations valued lower than desk based tasks in his working environment. Here, after Hugh has finished eating his lunch he stays for a chat with a colleague:

“...he said ‘hi, we haven’t seen each other for a long time, have we?’ And I said no we haven’t. And then I stayed there and we had a 30 or 40 minute conversation – I didn’t eat at all because I’d finished. Afterwards I reflected on and wrote about why do we see that as being inconsequential – that conversation being a nothing – and we see going back to our desk and typing away on e-mail as industrious and this is lazy. What’s happened to us in organisations to shape our thinking?” (Hugh, 2005)

Here Hugh expresses the value he now places on having a conversation with someone, particularly where there is no instrumental purpose involved. He contrasts this with how “we” tend to see these forms of interaction as inconsequential which suggests that perhaps *he* used to regard them as such, or he believes that his colleagues still do. Finally, in his closing question, Hugh reveals his awareness of discourses circulating

within organisations which influence the value placed on certain activities and not others. He rehearses this new insight again:

“It’s a bit like that lunchtime conversation or the coffee machine conversation – seeing these things as meaningful interactions that either contribute or not to our organisation, to our organisation culture, to performance.” (Hugh, 2005)

This illustration confirms that Hugh is drawing on the application of the complexity sciences to the field of management and leadership which featured in the curriculum on his Masters. From this perspective time invested in **people and relationships** is regarded as productive rather than being seen as a social activity which takes place in between real work. Hugh’s new focus on people and relationships instead of his own individual agency, leads to a rather surprising outcome. Hugh begins by describing his earlier desire for individual achievement, using his ideas and methods as he believed he knew best!

“A lot of the angst that I used to carry around with me – you know I used to want to change the whole of <organisation> overnight and do it single-handedly and do it myself, and my way was right, and there was only one way, and I used to have a lot of irritation and angst....” (Hugh, 2005)

However, in stark contrast he expresses how he feels now as a result of his Masters:

“...so it has had a tremendous calming effect on me.” (Hugh, 2005)

What is more, his colleagues and clients have also noticed a change in his demeanour:

“My clients, who are internal managers, have noticed a difference. A lot of people have noticed that this angst and this anger have gone away.” (Hugh, 2005)

So why does Hugh now feel much calmer? What has changed to make him feel this way? Hugh answers these questions by describing his shift in focus from immediate individual achievement to long term and **enduring collective accomplishment**. He

does this by describing some consulting he has been doing for part of the organisation, and how his intervention has generated a degree of 'dissonance'. Consequently he is expecting his assignment to be terminated when he meets the team later on, and he reflects on how he might feel when this happens:

"If they end the consultation the 'before' *Hugh* would have been beside himself because it's failure - I haven't changed them. Today if they end it maybe I did enough. Maybe I was right for them for a period of time. Maybe that dissonance is what they needed and maybe a consequence of the dissonance has to be that they end the piece of work with me. Maybe someone else will come in and continue, so I really like this 'building cathedrals' metaphor. Maybe I just put a brick in place and then someone else has got to do another one. So can you sense this calmness, I hope. Maybe I did all I can do, and that's it." (Hugh, 2005)

Hugh contrasts this feeling of calmness with how he believes he would have felt if this same scenario had occurred before his Masters:

"This warrior consultant before would have been furious. How dare you sack me?!" (Hugh, 2005)

Rather than taking their anticipated dismissal as a personal offence, Hugh feels content with his contribution to a bigger picture which will require time to develop and unfold. There is a maturity about his perspective, an ability to see the longer term and satisfaction as he reflects on his role in creating the eventual outcome.

Two years later in 2007, Hugh continued to work as an internal consultant in a large multi-national organisational, but now focusing on organizational consulting instead of leadership development. Hugh is upbeat as he reflects on his work over the last two years which he refers to as "a life changing experience":

“I am much calmer, more relaxed in my practice, more capable of rolling with the waves rather than battling against them.” (Hugh, 2007)

Hugh also talks with a sense of delight and enthusiasm about focusing on people, relationships and conversations in an environment where he still regards this as ‘different to the norm’:

“The aspects of my practice that are different to the norm? My ability to look through different lenses, to ask different questions, to be more relaxed and less uptight as a person, to not take life too seriously, and above all else, to value the relational and the conversational as highly as I now do. And because every day is filled with relationships and conversation, my life is so much richer for the <business school> experience.” (Hugh, 2007)

He goes on to describe how his colleagues are really beginning to appreciate his approach, and as a consequence, his workload is increasing:

“I would say that by far, the biggest thing is customer satisfaction, really. You only need to have one workshop that is based upon a theory of emergence. Managers leave saying ‘that was fantastic!’ and they would tell another three or four and the phone starts ringing.” (Hugh, 2007)

“Yeah, I feel really appreciated.” (Hugh, 2007)

Occasionally Hugh experiences some difficulties, particularly when he encounters what he calls the ‘traditionalists’ but his approach is to remain **gentle and respectful** rather than making direct challenges or drawing attention to his own concepts and methods:

“...you know, we’re trying to massage this into the organization, rather than hit it with a hammer...” (Hugh, 2007)

This gentleness is also evident when Hugh talks about some work he has been doing with a large external client. In this example Hugh conveys his delight in helping

others to understand the complexity approach to change, but also his respect and care for their existing perspectives:

“It's not always an easy ride though. Much of what I believe after my <masters> is 'radically new and different' and challenges traditional schools of thought. I did some external consulting this week for <organisation> and introduced complexity to a class of young potentials, when working with them on organisation and change. I love to see how it challenges their thinking, and I need to feed them carefully so that I plant a seed rather than dig up their garden.”

(Hugh, 2007)

The findings presented in this section portray Hugh as a management practitioner whose underlying paradigm and modus operandi have undergone a significant transformation. He describes his earlier focus on process, structure and control being replaced by ‘complexity informed’ practices which involve working in a much more unstructured way, investing in conversations and relationships, and seeing these as valuable and contributing to outcomes rather than as time-wasting distractions in between real work. Hugh feels calm when he is working in this emergent way, despite the uncertainty, vulnerability and admission of ‘not knowing’ which it involves. These changes can be summarised into three key themes, namely *relinquishing control, tolerating “not knowing”, valuing conversations and relationships*. In place of his earlier anger and impatience, Hugh now operates in a subtle, gentle, respectful and careful manner when working with colleagues. He calls this *planting seeds*. In place of his desire for individual achievement, Hugh’s pride is now located in the contribution he makes to collective outcomes and he is more patient in terms of the time-frame over which he expects things to come to fruition. He refers to this as *building cathedrals*.

### 6.3.2 Liberating the ‘enigma’

Kim was a senior manager in a large organisation, where she was responsible for leading a number of major change programmes. Kim recalls a period prior to her Masters when she was comfortable operating in an unstructured way and her boss gave her the space to do this because she was successful. Kim depicts her original unstructured approach as being focused on people and conversations, but she also talks about it being very high risk:

“Being open with information, giving people their heads to go and do things how they think they should be done, not how I’m telling them to be done or an outside process, giving people time to talk to each other face to face and reflect on things, balancing learning and doing.” (Kim, 2005)

“I just pull it off and that is a hugely risky way of doing things” (Kim, 2005)

Some time before joining the programme Kim acquires a new boss whom she portrays as very structured and process oriented. This exaggerates her sense of *misfit* with her organisation so she uses one of the tutorial sessions to understand why:

“I went from being very comfortable where I was to being totally uncomfortable where I was so they helped me to articulate and work through psychologically that misfit thing..... I didn’t really fit before but I had a leader, a manager, who was comfortable in letting me do my own thing.....My new boss has come from a manufacturing environment and he is very much around what is your goal, when are you going to do it by, how much have you improved it by so it’s very much the quality thinking.....His thinking style is over there, and my thinking style is over here. I have no voice any more. (Kim, 2005)

Kim describes her growing frustrations as she engages with people who work, or who expect to work, in highly structured task-oriented ways:

“...what I found frustrating about the way some parts of the organisation I work with work is that it’s all about process structure and tools, and nothing about people. That’s a bit dramatic, but you know what I mean.” (Kim, 2005)

Kim illustrates how this causes her to feel misunderstood, undervalued and isolated:

“I was very angry at the beginning of the year because I was so disappointed that I couldn’t contribute and I wasn’t valued. I’m not valued in what I do. Let’s reframe that. I don’t feel that I am valued in what I do. Half the time they don’t know what I’m talking about, and they totally disagree with me so they get very frustrated with me.” (Kim, 2005)

In order to cope with her situation, Kim decides to conform to the dominant way of doing things even though she does not believe it produces results:

“I have to conform in many respects to the dominant culture. I’m having to conform much more now to the dominant culture which is very much around process, very linear, you know – this is our goal, here are our steps, we do our steps, we get to the goal, which I can do if that’s what you want to do but will it achieve what we really want? I don’t think so. All we do is go round in circles.”  
(Kim, 2005)

However, Kim expresses her lack of faith in these structured processes as she observes the value placed on doing certain things:

“Doing – that’s what’s valued. We do tick the box. Now it’s got down to whatever date I put in. If I haven’t done it by that date it’s a black mark and I think that’s rubbish in the environment – they’re trying to control a global complex environment and it just absolutely makes no sense to me at all.....If this is the goal, this day you’ve got to get this, and this day you’ve got to get this, it won’t happen.” (Kim, 2005)

These illustrations highlight the completely different starting points for Hugh and Kim at the beginning of their learning journeys. Hugh began in favour of structured methodologies but learned to adopt a less controlling approach which blends structure and spontaneity, whereas Kim **prefers spontaneity** but is **required to adhere to the structured processes** which dominate her working environment. However, what is really intriguing is that Kim suggests that other people in the organization also have little faith in the structured processes but that they have chosen to keep quiet and work around things rather than admit there might be a problem:

“Everybody knows it won’t happen, and everybody knows how frustrated everybody gets, so everybody goes underground and works around all the processes so everybody expends their energy in the organisation working around the bloody processes. What do we do? We spend our time making the processes. So am I different – yes. Is it an issue – yes, it absolutely is an issue.”

(Kim, 2005)

The learning process on Kim’s Masters has embodied thoughtful preparation leading to apparently ‘unstructured delivery’, and somewhere in the midst of this process Kim realises that this is a model for her work. She eventually concludes that ‘structured’ and ‘unstructured’ approaches are not polar opposites as she had imagined, but powerful allies:

“Big, big learning for me because I’ve always done things on the fly because I’ve always got away with it because I can talk, I can think quickly. I was always very huffy about structure and process and frameworks. Why do people need that because I’m very comfortable with ambiguity in many respects, not every respect, but many respects and suddenly the penny dropped about getting a balance between this idea of freeflow, whatever you want to call it, and really

thoughtful preparation, and really thoughtful understanding of where people are coming from,” (Kim, 2005)

This is similar to Hugh employing a blended approach involving an **intelligent combination of structure and spontaneity**. Kim now sees a way to resolve her dislike of structure and formal processes and her instinct for the benefits of giving people time to talk. She realises that the conceptual frameworks featured in the programme, combined with her new self-awareness, intuition and capabilities, together provide a solid foundation on which she can build a thoughtful, well-prepared yet seemingly unstructured approach to her practice. However, this confirms her belief that she must leave her current employer:

“I know stuff now that I didn’t know before so I’ve got knowledge to build on. I’ve got understanding that I didn’t have before. I’ve got theories and frameworks that help me articulate and underpin what I instinctively feel, it has helped me shape the way I work and it’s helped me work out what I want and who I want to be – who I am really. Does that fit with my current role, job, company? No.” (Kim, 2005)

Two years later in 2007 Kim revisits the frustrations that prompted her to seek a new role elsewhere:

“In my previous organisation the challenges proved overwhelming. Key issues were short term focus, operational viewpoint rather than strategic; linear, cause and affect mind-set and command and control leadership.”

“In fact I felt I was perceived as an irritating enigma!” (Kim, 2007)

She moves to a new organisation within the same sector, to become head of a small team of internal consultants focusing on organisational change. This gives her freedom to apply her learning and to enjoy her work:

“I had to change companies to be able to practice in a different way.....In my new company we are collectively working on alignment from purpose, to strategy, to vision and values. Consequently I am employing many of the new ways of working developed from my Masters. It is now very good fun.” (Kim, 2007)

Kim believes that her approach to **change** had always rested on the **assumption** that **relationships between people are the key**:

“I always intuitively knew, or thought I knew anyway, how change really worked. I’m not trying to be like ‘I know the answers’ because there’s not an answer to know, so much as, my understanding, my belief, my intuition was really around the way people relate to each other creates change. And that it’s about how we think about things, that causes us to be either able to do things, or disabled from doing things.” (Kim, 2007)

Consequently, Kim describes how her **assumption has been confirmed** by the learning on her Masters, and as a result she feels able to act with confidence:

“Before my Masters I was working blind. Intuitively I felt that organisational alignment was key and that change was about how we think and relate, but I had no theoretical foundation and no methodologies to operate with.”

“Through my Masters I built a strong theoretical foundation on which I am now practicing. I know why I am making certain interventions and I know they will be successful. This builds confidence in my judgement and capability and brings organisational results, which is being recognised.” (Kim, 2007)

Consistent with this Kim describes her approach to organisational change as **conversational and viral** similar to the examples outlined by Hugh in which he gives examples of **acting into the unknown**:

“But it’s the people connecting that tends to create change so it’s around bringing people into... and creating an environment in which people can have what I will call ‘real conversations’...” (Kim, 2007)

“So I deliberately did not create this as a change programme, it’s not been labelled, it wasn’t announced, it wasn’t owned by anybody, it’s a viral thing, and people are now going ‘Oooh..., yes I’ve noticed what’s happening now’..” (Kim, 2007)

Recognising that ‘having conversations’ sounds like a very easy thing to do, Kim outlines how her Masters has given her a deeper understanding of the type of conversations she needs to generate in order to ignite change within the organisation:

“But that’s the difference, between where I used to be and where I am now... is that I know how to do that and I know the conditions that need to be in place to enable people to get beyond..., I think it’s a case of having different conversations which again is some of the fundamental theory and practice of the <business school> masters... It’s not just about having any conversation, but it’s about having different conversations that creates the shift.” (Kim, 2007)

With her new employer Kim has responsibility for engendering cultural change across the whole organisation and she is working with a group of like-minded colleagues on this. Kim expresses her awareness of the long term nature of her work, and her contentment with making a contribution towards a long term outcome:

“...And it’s not just me as well, there’s a number of other people who are creating change in a similar kind of way..... Well, I think it’s shifting, but I don’t think it’s just due to me. ....I have brought some of it.....you light fires all over the place.” (Kim, 2007)

“That may not be me who is taking them through that whole journey, other people take over and sustain it and move it on.” (Kim, 2007)

There is a maturity about Kim's perspective, similar to Hugh's metaphor of **building cathedrals**.

The findings presented in this section portray Kim as a management practitioner whose underlying paradigm and modus operandi have not undergone a significant transformation. Instead Kim claims her instinctive preferences have been confirmed, further informed and liberated through a learning process involving self-enquiry and affirmation. Having been required to focus on process, structure and control, Kim describes being set free to work in her original unstructured way, investing in conversations and relationships, and continuing to see these as valuable and contributing to outcomes. Kim now feels confident and capable when working in this emergent manner, having previously felt it was high risk. Kim's transfer of learning into her practice aligns with the themes in the illustrative case study for Hugh, with the exception of *relinquishing control*. Kim portrays herself as someone who never believed in control as the primary means of achieving organisational outcomes, so unlike Hugh, she had no need to relinquish this approach.

### **6.3.3 Changing practice**

The findings reveal several areas of commonality between the themes emerging in the illustrative case studies for Hugh and Kim, and other research subjects who made significant change to their working practices. These themes are therefore been used as an organising framework for this section. The first three themes (*relinquishing control, tolerating not knowing, valuing conversations and relationships*) are shared by several subjects while the fourth, *building cathedrals*, relates only to a minority. The fifth theme, *planting seeds* has been expanded in order to present the variations in tactics used by the research subjects to introduce changes, ranging from a subtle

approach (*planting seeds*), through to a very direct approach (*digging up gardens*), and each with their associated consequences.

### ***6.3.3.1 Relinquishing control***

The first key theme, relinquishing control, includes a variety of changes in working practices each of which reflects a rejection of control as the primary means of achieving organisational outcomes. One example of this is the rejection of structured processes for ‘doing work’ ranging from holding meetings without an agenda, through to abandoning structured change management or project management methodologies for large scale collective endeavours.

For example, Amy describes her rejection of structure and control in the early part of her learning journey:

“Because I recognised that I was so controlling and structured, for a while I swung completely the other way and I avoided structure and control.....and thought that I am not going to do anything like that, and completely give up control and I became really averse to any kind of templates or tickboxes or tables and I went out of my way to avoid doing anything like that.” (Amy, 2005)

However, like Hugh, Amy eventually reintegrates old and new thinking and adopts a balanced approach:

“...over time the pendulum swings back to the middle.....I guess I have gone from thinking it’s the only way on earth to operate, to the worst thing in the world to have all this control and structure, to now thinking it is not so much the control and structure and frameworks that are wrong, it’s the interpretation, perception and use of them therein, because nothing is ever good or bad - it is how it’s used and perceived.” (Amy, 2005)

James also describes how he is experimenting with unstructured meetings and he is explicit about the concept of complexity which is informing his practice:

“...but we don’t set it out as a meeting where we need to come to any conclusion. These events more serve as being a dialogue, every manager can actually take back whatever he has to take back from these occasions. So in a way, you might say that this is influenced a bit by complexity way of thinking, we don’t want to control,” (James, 2007)

A slightly different example comes from Ian, who describes experimenting with a fluid and largely unstructured approach to the development of corporate strategy. However, Ian is starting to feel constrained by the influence of other Divisions within the company, which appear to be reviving a more ‘traditional’ and by implication ‘highly structured’ approach to strategy.

“...let’s find out who the right people are and go to them and say we can arrange to facilitate a conversation between the two of you.....Now that model of strategy has worked really well here until recently, and the recent thing has been the European organisations who are now locking us into I guess a much more traditional view of strategy. It’s proving really difficult engage a more fluid, emergent, organic model with a very machine-like structure.” (Ian, 2005)

Fiona is also experimenting with a less structured approach on a large-scale programme of organisational change:

“Well, it’s something that I certainly would have learnt on the <masters>, the concept of going in to enquire co-operatively what the client.....about what was going on..., and what people wanted to start doing and stop doing, and with them agreeing what actions we might take in reviewing those actions and in reviewing

the next phase, rather than going in with a pre-planned, pre-cooked version of what might be appropriate.” (Fiona, 2007)

She contrasts this less controlling approach with the structured project management methodology she was required to utilise in her previous organisation:

“Because before I would have felt more pressured to come up with an action plan, be the expert and certainly at <previous organisation>, the favoured method was to have project management approach where you would quite quickly map out the entire project, sometimes for two years at a time, with milestones.” (Fiona, 2007)

Fiona highlights a perceived weakness of the ‘old’ approach in that learning which challenged the plan was regarded as an issue rather than useful information:

“It was so much ‘well this is in the plan’, and if you learnt something and it didn’t fit the plan, then it was criticised because there must be something wrong with the planning process, so it’s a different way of operating, so it’s emergent rather than project planning.” (Fiona, 2007)

Another example of relinquishing control comes from Gill who has reduced the amount of pre-planning she undertakes, here in respect of an Organisational Development (OD) intervention:

“I’m much more confident I think in the way I work with change as well, so less needing to .....engage in a more kind of O.D. process where you do your assessment, you do a diagnosis, you feedback to the client. I’m much more kind of seeing that the work is happening as you’re doing it.” (Gill, 2005)

In summary, six out of the twelve research subjects (Amy, Fiona, Gill, Hugh, Ian and James) describe adopting changes in working practices which reflect a rejection of control as the primary means of achieving organisational outcomes. Instead of trying to structure their projects or their meetings, these research subjects describe engaging

in a cycle of conversation, discovery and response within the overall context of some overarching objectives. At first sight this appears to be more risky than a tightly planned piece of work, but when taken within the context of other findings, many of them find it a more productive and less anxious way of operating.

### ***6.3.3.2 Tolerating “not knowing”***

The second key theme, tolerating “not knowing”, involves admitting to not having the answers to work-related issues, and working with others to develop the way forward, with no loss of self-esteem. This requires management practitioners to acknowledge their own vulnerability, and to have sufficient maturity and humility to be honest about the uncertainty they face.

Building on her earlier story, Amy describes trying to overcome her controlling tendencies. She believes that providing solutions for other people is a way of applying control and creating dependency:

“...when you are very controlling you tend to provide answers for people which you interpret as good leadership or management because you are helping people but in actual fact subconsciously you are creating dependencies on people and then it is like a recurring status thing because then you feel needed and valued.

That is me.” (Amy, 2005)

However, as a result of her Masters Amy is making an effort to ‘act into the unknown’:

“...now I am trying to move towards understanding and seeing what is, rather than trying to anticipate and move towards something. That is a big leap for me, I think that is going to be my ongoing learning, about trying not to label things too quickly, or have the answer and move towards that answer.” (Amy, 2005)

Similarly, Ian is resisting the requirement to come up with immediate answers, but this is contrary to the expectations he perceives among his colleagues. Ian feels that they want convergence towards a conclusion whereas he wants a divergent discussion:

“...and when people are saying give me the answer, I haven’t got the answer, and that’s okay not to have the answer; the whole idea is that we’re going to keep it open, this is the work we’re doing, and I’m working with these people. It doesn’t fit with people’s view that meetings have to be funnels and at the end you must be clearer than at the beginning.” (Ian, 2005)

Fiona also talks about letting go of the need to come up with perfect solutions and as a consequence she feels she can be much more exploratory and engaged:

“I think all the different ways of looking at things and the fact that I’m not going for one perfect answer is one way. Some of the ideas I’ve got from it I suppose. Things like using stories and conversations and feeling much more engaged in my work and more that I want to go out and talk to people and see what happens without necessarily being wedded to an outcome, which has meant that I’m going round having quite a lot of conversations with people with no particular thought about what’s in it for me.” (Fiona, 2005)

This can also be understood as a way of relinquishing control over the solution which will be devised, agreed and implemented. This is clearly liberating for Fiona which she illustrates with a direct reference to her reduced levels of anxiety:

“The fact that I’m not necessarily expecting there to be one perfect answer is more about my mindset than me going around preaching it. It just makes you less anxious about looking for the perfect answer.” (Fiona, 2005)

Paradoxically, although Gill feels more knowledgeable as a result of her Masters she feels much more able to say “I don’t know” when collaborating with colleagues:

“I think also maybe more able to say I don’t know, and less feeling a need to bring in my ... ironically I feel I’ve got more knowledge, more wisdom maybe, but less feeling the need to bring it in just to show that I do know.” (Gill, 2005)

Consequently Gill describes feeling much more relaxed about working with what emerges rather than worrying about deciding the outcome:

“...and you roll with the punches, it’s a bit like aikido...you follow the grain, rather than go against the grain. And it’s not like you’re colluding or losing yourself but it’s something about just going with where something is going, and I’m following the thread and seeing what happens.” (Gill, 2005)

In another example James uses his dissertation to rehearse how he wants to apply his learning, so that the managers around him begin to feel okay about not having all the answers. However, it is not clear whether this is being transferred into his practice:

“...so what I am doing in the dissertation is to see myself as a person starting up dialogues with both the managers about what is leadership, how do you understand leadership, providing them with maybe some of the new perspectives so they don’t just see themselves as persons that are just supposed to have answers, and if they don’t have answers they are bad managers.” (James, 2005)

In summary, five out of the twelve research subjects (Amy, Fiona, Gill, Hugh and Ian) describe adopting changes in working practices which involve admitting to not having the answers to work-related issues, and working with others to develop the way forward, with no loss of self-esteem. James is thinking about doing likewise. This is the same group of research subjects featured under the theme *relinquishing control*. The findings show that they experience a reduction in their levels of anxiety, as a result of letting go of the need to come up with perfect answers. They have accepted a greater sense of vulnerability and uncertainty yet they report feeling better.

### ***6.3.3.3 Valuing conversations and relationships***

The third key theme, valuing conversations and relationships, involves regarding social interactions as the primary means of managerial work. Not only is management viewed as an ongoing social process but investing time in developing, sustaining and repairing relationships is regarded as productive work, rather than a social activity which fills the gaps in between real work.

When Fiona is asked how her practice has changed as a result of her learning, she immediately offers her new conversational approach as the main item. Fiona is now seeing every conversation as meaningful and contributing to the change which she is responsible for bringing to fruition. She contrasts this with her old way of thinking in which she tended to compartmentalise a structured change programme from the rest of her daily interactions:

“...this has changed my approach to work because I guess I hadn’t seen myself as somebody who could change stuff through every small interaction that you have. Before I would have thought I’m doing my job and maybe over here there’s a change programme that I’ve got to drive through and every so often I would go over to it and try and drive something through and then go back to the day job. Now I think I’m approaching it from the point of view that everything I do and every conversation I have is the change process and yes we do little plans with bar charts and stuff and I know that’s helpful and useful but that isn’t it.”

(Fiona, 2005)

Gill is also beginning to work in an emergent and conversational way, similar to Fiona and Hugh. Much of Gill’s work involves organisational change yet intriguingly Gill now rejects the idea of calling herself a change agent. Instead when asked how she now thinks of herself and her role she replies:

“I suppose it’s about supporting spaces and people to be and think and talk differently together, and out of that, some change might happen. But I think the complexity approach has informed this, that change happens in relationship, it happens through different kinds of conversations and if I can support those spaces for different kinds of conversations...courageous creative conversations...that may be different to the norm, that might lend itself to change.” (Gill, 2005)

Ian is also experimenting with a conversation based approach in his work on strategy development and he recalls the progress he had made in establishing better quality conversations among the senior team:

“...we had actually got to the point where there was a lot of connection going on, at director level, at senior manager level, and people were starting to have different kinds of conversations” (Ian, 2005)

However, as the organisational environment changes and people become anxious, these changes appear to be reversed:

“...probably a year ago, the directors and this group of senior managers we were all starting to work in a very open and honest way and then it all fell to bits. It fell to bits mainly because there were things coming in from outside and it was no longer safe to be open and honest. One by one people started slowly shutting down, and then the whole thing fell to pieces.” (Ian, 2005)

However, while Ian is experiencing set-backs at an organisational level, he talks in very positive terms about outcomes within his team. Here he describes investing in a relationship with an employee who was initially reluctant to work for him:

“Over the two years we had increasingly quality of conversations to the point now that he really trusts me, he is much more able to do different things in this organisation as a result of what we have been doing together. If I had stayed at

the point of saying, okay, I'm going to transact with you as an employee and here's your tasks and I'm going to measure you, and squeeze you or reward you or whatever, I don't think we would be anywhere near where we are right now."

(Ian, 2005)

Gill goes one step further when she expresses her intention to invest not only in her relationships with other people, but to also attend to the relationships they have with each other:

"So, I think the nature of my work has shifted much less from one-off events to much more long-term relationships over time as well and seeing the value of the relational side to my work. Actually I think that to me is core really, both my relationship with my clients but also the quality of the relationships people have with each other." (Gill, 2005)

#### **6.3.3.4 Building cathedrals**

The fourth theme, building cathedrals, contains several elements including being less obsessed with individual achievement and instead being content with contributing to collective outcomes. It also encompasses calmness and patience, particularly in terms of the timeframe in which outcomes can be achieved. The Individual case studies for Hugh and Kim both provide illustrations of this, but one other research subject also gave some examples.

In 2007 Amy describes a situation in which poor working relationships are adversely affecting a team who sit in cubicles which Amy immediately regards as "a visible manifestation of the dry and controlling atmosphere." She recommends several times that the cubicles are removed but the team are reluctant. Later, at an away-day, someone else makes the same suggestion, a debate follows and the cubicles are

removed. Amy expresses her satisfaction in the collective outcome rather than her personal glory:

“And that’s really another personal learning point for me because a few years ago, I would have had to get the credit for that, and I so don’t anymore. That fact that it’s done is enough.” (Amy, 2007)

Again in 2007 Amy describes collaborating with colleagues without seeking individual recognition as she had done in the past:

“I actively involved others in sharing and inputting ideas into the scheme - something I would not have been confident in doing before in case I did not get ‘full credit’ for the task.” (Amy, 2007)

### ***6.3.3.5 Planting seeds or digging up gardens?***

Hugh explicitly refers to the gentle tactics he adopted when introducing new practices. Taking care not to ‘rubbish’ the old or existing methods he says “I plant a seed rather than dig up their garden” as a metaphor for his subtlety. Hugh’s account suggests that his sensitive approach generated mainly positive reactions from colleagues. This section presents related findings for the other research subjects, focusing mainly on those research subjects who reported making significant changes in their practice. However, some of the other research subjects also described challenging conventional practices within their organisations hence a number of their illustrations are also included.

Amy implements some changes in a **direct** manner but initially this **confuses her colleagues**. Like Hugh she describes running meetings without an agenda and she talks about stepping away from her previously controlling approach:

“...when I tried to step away from that it was almost as if they couldn’t handle it in the beginning because we are used to this structure and you are now trying to withdraw it because you are going on this journey of enlightenment but that’s not helping us because we are used to that, so I had to work through it.” (Amy, 2005)

Amy persists with these changes over a period of time leading to improvements in the quality of conversations taking place in her team meetings:

“There was a period of six months where I would do one step at a time .....until we got to a position where it was a proper dialogue rather than this ping-pong discussion i.e. it’s my turn to talk.” (Amy, 2005)

Ian is similarly **direct with his colleagues** and this appears to **distress** them such that they start avoiding him when he returns from a module on his Masters:

“A pattern I have, and I think I’m disturbing it now, is very much about if I’d learned something conceptually I want to try and practise it as quickly as possible. My team have coined this phrase “<business school> Mondays” – they actually decided that they would try and book as much of Monday out with other people as possible.” (Ian, 2005)

“What I was doing was provoking anxiety in others so by challenging their assumptions, whatever my latest point of reference was, I was clearly in some way challenging” (Ian, 2005)

Gill experiments with a very **direct approach to a client** when she bids for a new project. The proposal articulates a complexity informed approach but whilst the client is very interested and acknowledges the value of the approach, Gill believes they are too **nervous and risk averse** to proceed:

“I offered a more complexity approach, you know, conversational, working with what emerges, kind of loose framework, experimentation, working with the ordinary and extraordinary ways kind of thing, and kind of thought I’ll just

experiment. I didn't actually want the job but I thought I'll just see, and they loved it. They were shit-scared as well because it was so different and they came back to me – I didn't get it." (Gill, 2005)

"It was too risky and too unpredictable but they actually felt it would probably give them what they wanted." (Gill, 2005)

Chris describes himself as a maverick and following several promotions he feels 'permitted' to challenge some of the conventions within his organisation. This freedom is compounded by the learning Chris derives from his Masters:

"But what it did was to make me understand the futility of some of the restrictions you impose on yourself and the way you think..." (Chris, 2005)

As a result Chris begins to make **direct challenges** to existing practices but this appears to be met with **resistance and confusion**:

"...I have challenged openly the convention about how this should be done, and met with quite a lot of resistance sometimes, specifically from my own <unit name> when I meet colleagues with the same background as myself, not ostracised but the phrase they would use is 'Chris has moved over to the dark side'.....The dark side meaning in a 'star wars' sense – don't know where he is, what he's doing, why he's there, but he's definitely there not doing what we normally do." (Chris, 2005)

In this illustration Chris uses the word **ostracised** although he clarifies that he is not actually being ostracised. However, two years later when asked how he feels about continuing to challenge the status quo, Chris describes his isolation and exhaustion:

"It's very lonely.....yeah, and it continues to be pretty lonely.....Quite possibly, it's the most exhausting part." (Chris, 2007)

Gill, who is working as a freelance consultant also recognises the risk of feeling **isolated** if she continues to challenge conventional practices:

“I think really being prepared to see your practice challenging and if you’re working with an outside organisation you’re going to find yourself with quite a lone voice at times and really make sure you get support and find allies.” (Gill, 2005)

Despite his sense of isolation, Chris portrays himself as persistent and he believes that his actions are enabling others to challenge conventions:

“I’ve challenged a few sacred cows and invited others to join me and that’s provided the catalyst for other sacred cows to be challenged as well without me having to do it myself.” (Chris, 2007)

However, things develop into a difficult and potentially career threatening situation when Chris experiences a **negative response** in his annual appraisal in 2007. His line manager begins his written appraisal with a direct insult which makes Chris feel very angry:

“...my boss opened his first line with something along the lines of (it’s almost a direct quote) ‘Chris employs an awful lot of management bollocks’ and I took him to task actually. I challenged him and said ‘in my 21 years of service, I’ve never had to defend myself on someone’s judgement on me three years worth of work. But in this case, you’re out of order, you don’t know what you’re talking about, you don’t understand what we’re achieving. And frankly, I’m insulted and unless you change it, then I’m going to do something about it.’” (Chris, 2007)

Here Chris expresses his hurt, and accuses his line manager of **misunderstanding** his working practices, overlooking the positive results which he believes they have generated. Fortunately for Chris he persuades his boss to withdraw the comment.

Ian also receives a **negative response** from his boss as a result of experimenting with a conversation based approach to his work on strategy development. Ian illustrates these difficulties when he recalls a conversation with his line manager immediately after one of the strategy meetings:

“...my boss came to me – he wasn’t in the meeting – and said I’ve got some feedback for you from the meeting. I said, okay. He said you have to stop using the word ‘conversation’ and I laughed, and he said no, I’m not joking. I said okay, why? He said people are just assuming you’re going round talking to people and nothing is happening. I said does anything happen without having conversations? He said, yes, I know about that, but this is what I’m telling you.”

(Ian, 2005)

Ian is told to stop referring to conversations because his peers are apparently associating this activity with **not doing real work**. This has similarities with Hugh’s observation that certain activities, such as typing emails and regarded as being industrious, while others, such as having conversations, are regarded as being lazy. In a similar vein, Edward describes experiencing a negative reaction from several participants in a leadership development away-day which he has recently facilitated. Here he describes his perception of their reactions:

“I think sometimes people see some of what I do as a bit pink and fluffy.....  
There’s a sort of perception that anything that’s reflective and not in the norm of sort of ‘gung-ho’ type of activity, is all a bit pink and fluffy, isn’t it.” (Edward, 2007)

Edward works in a highly structured, traditional organisation where existing practices are well established. In the example above Edward suggests that there is a **gendered tension** between the reflective (feminine) approach which he has employed and the expectations of his colleagues, mainly men, who allegedly want the away-day to be

full of (masculine) tasks and activities. Ben also experiences a form of tension within his organisation, but this appears to be an **instrumental tension** between thoughtful debate, which he is trying to encourage, and his colleagues' demands for decisiveness:

“...of course it doesn't help in business if you keep chucking things up in the air because you do need decisions and you do need a bit of decisiveness, but it is about balance. But I think at times people just look for the easy way, just a fact....” (Ben, 2007)

James also perceives a tension between colleagues' desire for decisions and his interventions in managerial meetings which encourage deeper thinking and prolong the debate:

“So it's very difficult for them to use 15 mins to just come up with different ideas or 'what is your view?' and be interested in another person's view, and ask 'what does that mean?' and does that make us think differently about this. They cannot do that because when I start asking these questions, I can see that they get frustrated because I think I begin to raise the insecurity in the group by doing this, because this is not – in their minds – what we're here to do, we're here to make decisions.” (James, 2007)

Two different examples come from Ian and Lucy, each describing difficult experiences which pose a **challenge to their sense of authenticity**. Ian is trying to implement a new approach to developing strategy but he is feeling constrained by the organisational structure. He expresses his uneasiness and uncertainty about whether he will find it possible to align his practice with his thinking and thereby maintain a sense of authenticity:

“It's proving really difficult engage a more fluid, emergent, organic model with a very machine-like structure. So part of my role right now is about how on earth

do I protect my people to make sure they keep their jobs in an environment which is incredibly challenging around my principles, my philosophy, all of those things.” (Ian, 2005)

Lucy also experiences a challenge to her principles when she expresses her frustration with colleagues who want to ‘do what the client says’ whereas Lucy says she wants to ‘do what the client really needs’:

“And that is what marks me as working very differently to other people. Because the other people are kind of like ‘Oh, *Lucy* shut up - let’s just take the brief and make the programme’, I really really do not want - I’ve done it long enough..., making programmes that are designed to fix something which is not the thing that needs to be fixed.” (Lucy, 2007)

Talking in 2007, Gill and Ian each describe how they have **learned to be more subtle** in the way they work with unconventional approaches:

“I’ve kind of softened a little bit cos I’ve realized there’s no point being a kind of moralistic imposer, I think I was still on a bit of ‘this is the right way’ .....where I am now, I think first of all, I’m much more likely to start supporting somebody than challenging them.” (Ian, 2007)

Similarly, Gill expresses her belief in the need to be subtle and measured in challenging people and existing practices:

“In a sense that if you don’t offer enough difference there won’t be change and if you offer too much, then you’ll be ejected by the system. And I think now, I would probably feel less attached to ‘this is my approach’, kind of ‘take it or leave it’ and maybe be a bit more subtle and not to see it as a kind of cause or challenge that I have to take on people in a way...,” (Gill, 2007)

Likewise, Edward expresses his appreciation of the need to be subtle when running leadership development programmes for other staff. Reconciling the organisational pressures to 'keep to the script' with his exposure to a variety of alternative ideas and perspectives, Edward outlines his tactics:

"I probably would still stick to what we do but I think I would probably explain it in a better way. Rather than saying "this is the way to do it", I would probably say "this is a way of doing it that is quite effective; however, please be aware there are other ways and there is a time and a place for each method". Just open their eyes to the fact that there isn't a black and white way of doing leadership."

(Edward, 2005)

#### **6.3.4 Applying knowledge and skills**

This final set of findings features *examples* of new skills and knowledge which the research subjects reported transferring into their practice. In most instances these do not represent changes in practice in the sense of doing things differently, but instead they relate to the application of new skills (e.g. observation, reflection) as the research subjects enact their roles.

A number of the research subjects talked about having greater **insights into other people's behaviour** alongside increased **awareness of their own behaviour** and impact on other people. In her 2005 interview Amy says that for her 'the light had gone on' in terms of noticing other people's behaviour. She gives an example of a working lunch at which the Director, chairing the meeting, asks her to move seats because he feels her location is too prominent:

"...I nearly exploded with awareness.....the Director who was chairing the meeting actually came and asked me to move because he thought that chair was

the commanding position. It was like an out of body experience – as I was moving chairs I almost went to the side of the room and just thought that is an amazing dynamic that has just happened there, and things like that happen all the time now.” (Amy, 2005)

Fiona talks about noticing both her own and other people’s behaviour and using this, in real time, to inform her contribution to the situation:

“...even in a meeting now I’m thinking how is this going, what am I bringing to this, am I helping this process or not.....noticing things like relationships between people or when people start using certain sorts of language and how that changes stuff, and just being much more aware of what’s happening and feeling more interested in trying to do something that would actually change the course or the tone of the meeting.” (Fiona, 2005)

Similarly, Gill describes developing her ability to utilise observations, feelings and thoughts in a way which informs her contribution as she interacts with people:

“...I feel more able to work at the moment in terms of “what I’m noticing now is”, let’s kind of press the pause button “what’s happening now” and feeling more able to handle whatever comes out.” (Gill, 2005)

“...more able to kind of notice what’s going on here and accessing that more, my belly, my heart, not just what I think should be happening and what should I say now, but more in touch with parts of myself.” (Gill, 2005)

The second example of applying new knowledge and skills, relates to developing **empathetic competence**, meaning an increased ability to understand other people’s experiences and perspectives. In this illustration, Ian describes working with colleagues immediately after a director has behaved very strangely in a meeting:

“I now simply understand more how to understand where people are, so if Richard is stressed out in a meeting .....I started thinking let’s just try and understand what his context is. The poor guy is marketing director, he’s not sure whether he’s going to keep his job, he’s got 250 people to look after. Maybe if we got in touch with that it might explain his behaviour. It might not, but at least we may have an alternative view.” (Ian, 2005)

Edward describes his new ability to appreciate that people have different perspectives, and that consequently he is now able to tolerate holding different opinions:

“I think it all revolves around my ability to see other people’s opinions a lot more clearly, and not be so determined that my opinion is correct. I think I now see that we all have a different view of the world and my view is only *Edward’s* view of the world – that doesn’t make it right or wrong, it just makes it the way I see the world.” (Edward, 2005)

The illustration from Ian indicates that not only is he able to understand other people’s perspectives, he is also shifting into and sharing their perspective while engaging with them, without losing sight of his own reality:

“...my country manager. When I’m with him I have to somehow shift back into a rational world.” (Ian, 2005)

“I guess there’s something for that it’s constantly about this phase shifting and I think I’m learning now when to phase shift whereas maybe a month ago I was actually fairly ready to say, no – it’s all about complexity. Two years ago I was wedded to ‘it’s all about rationality’ so somehow you’ve got to live in these two worlds.” (Ian, 2005)

Similarly, Amy applies her learning to join her boss, Dave, ‘in his reality’ and thereby resolve a longstanding difference of opinion with him:

“I had this conversation and I realised that my way of conversing with Dave was purely on an emotional level, and Dave’s way of conversing with me was purely on a factual, operational level. . . . I was getting really frustrated that he wasn’t seeing my reality so I decided to go into his reality to change my situation, and it was one of these textbook success stories. . . . Dave recognised all my points. . . .”

(Amy, 2005)

A number of research subjects described being much **more thoughtful and reflective** in their approach to work as a result of their learning experience. This included thinking about problems from different angles or perspectives and thereby seeking to reframe them. For example, Edward outlines the tendency for people in his organisations to be very task focused, but he is adopting a more reflective approach:

“...in the past I would think – we’ve got a task to do, how are we going to this, how are we going to get to the end very quickly? Let’s do this efficiently and then we’ll sort everything else out at the end. I am now much more inclined to sit back a little bit, reflect on exactly what the problem is and look at all of the options and perhaps consider the task in a much wider perspective than I had in the past.” (Edward, 2005)

This is an example of a reflective practitioner paying attention to *problem setting* rather than simply *problem solving* (Schon, 1983). Ben also gives an example of this type of reflective practice when he talks about his approach prior to the course and subsequently in 2005:

“If I go back a couple of years my thought processes would have started at a certain point. I come up with the same thoughts but it doesn’t start at that point. I won’t go perhaps to the solution first, or look for the solution.” (Ben, 2005)

“That’s something else I have learned is to think much more about what I am doing.” (Ben, 2005)

In another example, James contrasts his earlier ‘action man’ approach with his new desire to create space for thinking rather than rushing into doing:

“...it’s easier for me to be in meetings without just falling into the need to just perform or deliver. I don’t know how to say it but – something about - I’m a little bit more relaxed about just being, whereas in the past I probably – I’m also ESTP - so I’m very much into action and want to do something.” (James, 2005)

The final group of findings relate to research subjects bringing **new knowledge and broader perspectives** into their work, thus enabling them to think about things from a wider range of viewpoints. Ben provided numerous illustrations including this one in which he described challenging the assumptions informing decision made by his senior colleagues during management meetings:

“My ex boss.....he said that I did change through that <masters> process, not only in confidence, but also the ability to take a step back and consider different points of view or different angles.” (Ben, 2007)

The sense of pride and confidence which these broader perspectives gave Ben was evident throughout the interview in 2005:

“...but this has given me even more confidence to deal with difficult issues at work in a different way.” (Ben, 2005)

Not only was Ben engaging with a broader range of ideas and perspectives, he also gave several examples of how he was learning to think more critically about these:

“I think the biggest thing I have learned is assumptions in life – don’t assume anything. Everything is based on assumption and it’s all right but there isn’t an answer.” (Ben, 2005)

## **7 INTERPRETATION OF FINDINGS**

This chapter features an interpretation of the empirical research findings and thereby begins the process of answering the refined research questions set out in Chapter 5.

The focus is on interpreting the findings in order to understand both how they illustrate existing arguments and theories featured in the Literature Review and to identify where new insights or knowledge emerge from the data. The implications of these findings, for the theory and practice of management and management education, are discussed later in Chapter 8.

The first section (7.1) focuses on the emotions which the research subjects associated with their learning experiences, comparing findings with those from previous research studies and predictions made by various scholars, reviewed in sections 2.4 and 2.5 of the literature review. The findings illustrate Vince's (1996) cycles of emotions which either promote or discourage learning. The findings also highlight the risk of learners making a premature exit from these cycles if they are not well supported. The second section (7.2) focuses on the emotions which the research subjects associated with the transfer of learning into their workplace. Once again this is compared with research and theory reviewed in Chapter 2 but the discussion also draws on management frames of reference reviewed in Chapter 4. The findings make new contributions to this body of knowledge by providing examples of research subjects who changed their working practices and who associated these changes with a greater sense of well-being. These findings are contrary to some earlier studies (e.g. Brookfield, 1994) which fuelled pessimistic conjecture by the academy in recent years (e.g. Reynolds, 1999).

The third section (7.3) focuses on changes in conceptual frames of reference and working practices which some of the research subjects attributed to their learning experiences. Drawing on the managerial discourses reviewed in Chapter 4, this section features those research subjects who described migrating away from the dominant conception of managerial work as depicted in Watson's (2002) systems-control thinking. The findings provide vivid illustrations of individuals attributing to their learning experiences, fundamental changes in their underlying assumptions and hence behaviours. This includes changes in their understanding of organisations and human nature, and significant changes in the logic of effectiveness underpinning their practice. The final section (7.3.3) focuses on the social consequences for the research subjects. This includes reported reactions from their colleagues, the extent to which the subjects felt constrained from enacting their role in new ways and whether they described being able to sustain changes in their practice.

It is important to remember that this research is primarily focused on the transfer of learning into the workplace, in particular whether the learning experiences have set up contradictions for the research subjects within their organisational settings. Therefore the discussion does not address questions relating to the generation of learning i.e. the learning processes, how the educators created the learning environment, what learning outcomes they intended and whether these were achieved and so on. These are all interesting and important questions but they were not the focus of this research.

## **7.1 Learning experiences – engagement and emotions**

What emotions did the research subjects associate with their learning experiences?

Interpretation of the findings presented in Section 6.2, requires an acknowledgment of the numerous factors which may have contributed to the accounts generated during the

interviews with each research subject. These factors include who the research subjects are (age, maturity, experience, prior learning, cultural background), how they came to be on the programme, what type of learning they expected, what type of learning they encountered, how willing they were to engage in the learning and their relationships with faculty and fellow participants. Their accounts may also have been influenced by how willing they were to talk to me about their emotions. For example, in Western culture, women talk about their emotions more than men, and this gender bias may have been exaggerated in conversation with a female researcher. Furthermore, the research subjects may have been motivated to give a positive account of their experiences having invested considerable time, energy and money into their studies.

### **7.1.1 Mature and willing**

The majority of the Ashridge and Exeter students were mature (age 37 to 45) with considerable work experience (one had 9 years, the rest between 13 and 29 years) and many had selected their Masters programme specifically because it offered alternative perspectives and the possibility of transformation. Hence both programmes were designed to attract people who were already open to alternative ways of thinking about organizations and how to work effectively within them. Several of the research subjects described how they chose their Masters programme specifically because they were searching for alternative perspectives, as illustrated by Hugh and Ian:

“I had this vague belief that there was another way to do this, and that in fact the work that I was doing might be done better.” (Hugh, 2005)

“I started getting interested in group dynamics, I started getting really interested in alternative leadership styles.” (Ian, 2005)

Hence many of the research subjects were mature, experienced and looking for challenges to their existing thinking. So unlike the MBA students researched by Currie and Knights (2003) and Sinclair (2007) who appeared focused on instrumental learning and career enhancement, many of my research subjects were expecting to review their frames of reference and were therefore more likely to be willing to engage in critique and challenges to conventional wisdom. As in Nord and Jermier's (1992) research some of the most enthusiastic participants were women, including Kim, Fiona and Gill, who entered the programme with a variety of pre-existing frustrations. However, this initial propensity and readiness to engage in critique was not the case for all of the research subjects. Amy, Ben, Dave and Edward each talked about seeking a qualification, while Chris was placed on the programme by his employer and Lucy seemed to want to simply learn how to be a consultant. These contrasting orientations are taken into account in the following discussion of the emotions which each of them attributed to their learning.

### **7.1.2 Promoting learning**

When a learner is confronted with responsibility for their own learning this generates anxiety and Vince (1996) proposed two different cycles of emotions depending on whether the learner responds to their initial anxiety in a constructive or defensive manner. The patterns of emotions described by Amy, Hugh, Ian, Fiona, Gill, Kim and Dave are broadly consistent with Vince's (1996) *promotion of learning cycle* proceeding from anxiety to uncertainty, through risk and struggle finally reaching new insights. Three of these research subjects, Amy, Hugh and Ian, gave particularly vivid accounts of turbulent emotional journeys which spanned a significant bandwidth from profound highs to deep and disturbing lows, the equivalent of an emotional rollercoaster ride which was exhilarating but frightening, enjoyable but unsettling and

appreciated once it was over. Their emotional journeys were characterised by full immersion in the learning process involving exploration of beliefs, assumptions, habits and mental models followed by a return 'to the surface' with new and changed perspectives. Hugh summed this up as follows:

"I think what this programme has done is really pushed me much deeper, really pushed me under, somehow forced me to look deeper than I ever dare look before." (Hugh, 2005)

These subjects used words such as *painful, frightening, anxious, turbulent, traumatic, torture* and *scary* to describe their emotions and feelings during periods when they were developing a deeper understanding of themselves, having their assumptions and beliefs challenged, or reviewing their understanding of organizations and hence the nature and purpose of their work. The powerful emotions depicted by these research subjects were attributed to a variety of different situations. These included outrage when existing methodologies were challenged, being angry towards faculty members, hurt when awakening to their own behavioural tendencies and a sense of despair when realising the enormity of challenging conventional practices back in the workplace.

Within my sphere of interest there have been only a handful of research studies in which programme participants experienced risk, uncertainty, discomfort but also 'real personal change' which may have constituted transformative learning (Hagen *et al*, 2003; Rigg and Trehan, 2004; Trehan and Rigg, 2007). Therefore the accounts provided by Amy, Hugh and Ian are of particular interest because if one takes into account their portrayal of intense and unsettling emotions combined with significant changes in their perspectives and working practice, then these subjects appear to have experienced *transformative learning*. What is particularly interesting is that these

findings provide vivid illustrations of the different types of changes in personal perspectives which can be generated by a transformative learning experience. For example, Amy described waking up to her controlling tendencies and how these had infused her managerial approach. Like Fenwick's (2005) research subjects, she was excited by the insights generated by a critique of dominant ideologies. Hugh realized the weaknesses and limitations of the structured methodologies he had devised and deployed while Ian's personal epiphany enabled him to realize, seemingly for the first time, that his job was all about people. These illustrations demonstrate the possibilities for critical pedagogy in management education to generate insights into individual behaviour, managerial methods and managerial roles. Another way of saying this is to recognize the transformative potential of critical management learning at the individual and organizational level as illustrated in previous research (Rigg and Trehan, 2004).

In contrast, Dave talked about experiencing anxiety and unsettling emotions consistent with the promotion of learning cycle, but without any counter-balancing positive outcomes or significant transformation. Dave described this very succinctly:

“...the whole of my world has been, has had the legs taken away from under it.”

(Dave, 2005)

The findings suggest at least two key differences between Dave and those research subjects who gave more positive accounts of their learning outcomes. Firstly, Dave described several difficult personal events which occurred during the period immediately prior to the programme and these potentially diminished his resilience. Retrospectively, Dave expressed concerns about taking on challenges during a difficult period in his life when he was not 'emotionally robust'. The literature on

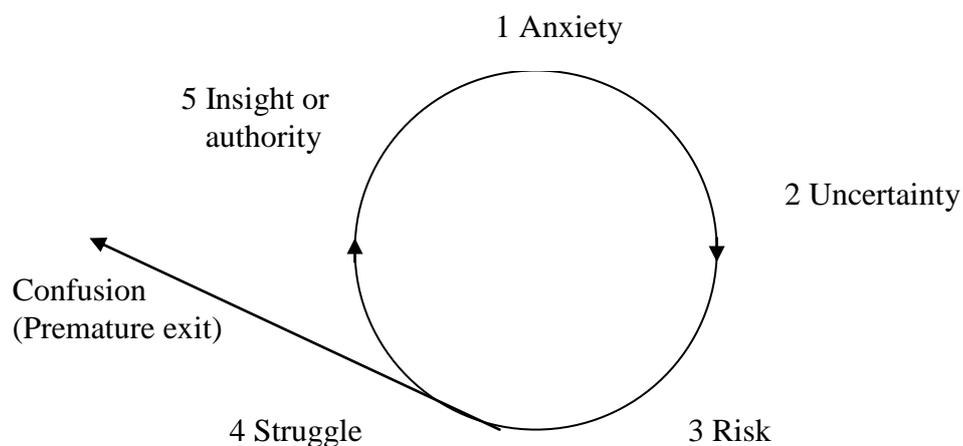
transformative learning emphasises the need for participants to be emotionally mature with well developed abilities to handle relationships, handle their own emotions and with strong social competencies in areas such as empathy, self-control and trustworthiness (Mezirow, 2000). We have no evidence of Dave's capabilities in each of these areas but it is reasonable to suggest that they would have been weakened by high-stress events in his life in the period prior to commencing the programme. Dave outlines his belief in the transformative potential of critical pedagogy but based on his experience, he spoke of the danger of embarking on such a venture at a time of personal stress:

“If you really fundamentally want to change what you're doing and you really fundamentally want a different approach and you've got the time and resources to go through the Sigmoid dip then consider, then consider, the critical studies one, but be very careful about who you put on it. Don't put them on it if they're anywhere near a mid-life crisis.” (Dave, 2005)

Dave was the only research subject to embark on his Masters during a period of high personal stress and he was the only research subject to describe the learning experience as damaging. It is possible that these factors are related. The second key difference between Dave and the other unsettled participants is that unlike Dave, the others were able to clearly articulate new ways of thinking which underpinned their emerging practice. By contrast, Dave talked about acquiring more questions than answers and during the 2005 interview he gave lengthy and sometimes jumbled descriptions of several new concepts which he had encountered on the programme. Overall, Dave's previous *certainty* appeared to have been replaced by *ambiguity* and *confusion* consistent with some of Brookfield's (1994) subjects who experienced a disturbing loss of innocence (everything ambiguous and uncertain). This amplifies Fenwick's (2005) concerns about whether it is ethical for educators to disturb other

people's values and beliefs, without offering a constructive and hopeful alternative. A comparison between Dave's account of his experiences and Vince's (1996) cycle of emotions promoting learning suggests that the cycle does not necessarily proceed from *struggle* through to *insight* or *authority*. In the findings presented for Dave he talked about not finding answers, feeling very frightened, losing confidence, feeling dismantled, all of which indicates that he engaged with his initial anxiety and the learning process but did not reach the positive state of *insight* or *authority*. This suggests that a learner may unintentionally exit the cycle on a tangent characterised by *confusion* and *anger* as depicted in Figure 16.

**Figure 16 Cycle of emotions promoting learning - revised to recognise risk of premature exit**



Adapted from Vince (1996)

It is interesting that Dave made no reference to receiving personal support from faculty during his learning experience, and this may have been a contributory factor to his sense of feeling 'damaged' by the process. It has been alleged that Universities tend to ignore the need to provide emotional support to management education

participants (Cunningham and Dawes, 1997). However, the interview transcripts and the data gathered in respect of the Ashridge and Exeter programmes provide examples of how the students were supported throughout this process. The Ashridge students received regular support via a series of one-day application groups which were held in between scheduled workshops, facilitated by their tutor and attended by three to four of their fellow students. Comments made by the students about these groups indicate that their success depended upon the quality of the tutor and relationships within the group. Where these were both positive, then the application group provided valuable support for students experiencing unsettling experiences and emotions. There were also examples of some of the research subjects forming close friendships which in themselves acted as support mechanisms. The Exeter students did not experience personal tutoring in the manner provided by Ashridge. Instead they appeared to have a number of one-to-one tutorials with a personal tutor during the residential modules. In addition there are several indications in the data that the students provided support for each other. This arose from the cohort developing into a close knit group with some members forming enduring friendships and work partnerships.

Contrast Dave's experience with two other research subjects who placed a high value on the personal support which they received.

“I mean the intensity of the support was for me really exceptional.” (Gill, 2005)

“I've had massive support from my tutors” (Kim, 2005)

These two subjects are among a group of three, Gill, Fiona and Kim, who gave accounts broadly consistent with Vince's (1996) *promotion of learning cycle*. This included profound discomfort leading to positive personal change during the learning process. However, Gill, Fiona and Kim did not describe the extreme highs and lows

reported by Amy, Hugh, Ian and Dave. Instead they used phrases such as *anxiety provoking, deeply irritating, cross, uncomfortable, upset, heavy, hard going, stretched, feeling vulnerable, challenged, falling apart* and *scary* to describe the troubling feelings and emotions which they experienced during their learning. These findings mirror those from previous studies in which programme participants struggled with responsibility for their own learning, but learned most from these situations despite the discomfort which they generated (Reynolds and Trehan, 2001; Rigg and Trehan, 2004; Trehan and Rigg, 2007). What is striking about the accounts created by Gill, Fiona and Kim is the depth of self-awareness which they claim to have developed. In place of the sudden and shocking changes in perspectives described by Amy, Hugh and Ian, these three subjects talked in terms of uncovering, understanding, nurturing and releasing capabilities which seemed to be within them. Kim summed this up when she said:

“So becoming more of who I am and being okay with that.....” (Kim, 2005)

Similarly, Gill described learning to trust her own feelings and judgement and to regard these as valuable components of her practice:

“I’ve noticed what I bring is that more intuitive capacity, I think the relational and actually giving more value to that.....Actually that is kind of core to my practice, and that ability to relate, that ability to really trust your intuition and to access that.” (Gill, 2005)

Instead of discarding their favourite managerial models, these subjects focused on throwing away internal constraints or doubts:

“So this has helped me to recognise the things that held me back, the things that were in me.....” (Kim, 2005)

The accounts provided by Kim, Gill and Fiona do not align with descriptions of transformative learning (Mezirow, 1990, 2000) but instead have more similarities with developing their ability “to perceive critically *the way they exist* in the world” (Freire, 1970, p64) more broadly described as the emergence of consciousness (Freire, 1970). This form of education is affirmative and enables changes in the way people act in the world based on shifts in how they perceive themselves. For example, in the following illustration Fiona articulates her new belief in the significant impact she believes she can have simply by conversing with people, a belief rooted in the complexity approach to change featured on Fiona’s programme.

“...this has changed my approach to work because I guess I hadn’t seen myself as somebody who could change stuff through every small interaction that you have.” (Fiona, 2005)

However, what is important in this illustration is Fiona’s direct reference to the way her learning has changed her self-perception, when she says “I guess I hadn’t seen myself as somebody who could...”. This is a clear example of the *emergence of consciousness* (Freire, 1970) in a female research subject who had previously talked about wanting to learn to approach her consulting practice with confidence rather than feeling she was “just pretending” (Fiona, 2005).

### **7.1.3 Discouraging learning**

The pattern of emotions described by Lucy was broadly consistent with Vince’s (1996) *discouraging learning cycle* (Figure 4) in which anxiety leads to denial, avoidance, resistance and willing ignorance. Throughout her account in 2005 Lucy described her distaste for a learning process in which faculty “dig in and try to get to the heart of stuff” particularly as she believed that this distressed some of her fellow participants. Through several examples featured in the findings, Lucy talked about

keeping out of these introspective discussions arguing that it was not the best way to learn and not how she personally wanted to learn.

In addition to resisting engagement in reflective learning, Lucy also appeared, at times, to be an outsider in the learning process, for example when faculty invited participants to let go of their previous managerial models. Lucy described herself as having no previous experience of management education and no models to let go, because her practice involved “making it up”. Despite her apparent confidence when interviewed in 2005, Lucy later admitted in 2007 that she was at “rock bottom” during the programme. Taken together these findings suggest that the action-based learning process generated *anxiety* for Lucy, but that she chose to *avoid* and *resist* engagement with this and hence volunteered for *willing ignorance*. Lucy’s account of her experiences has similarities with findings reported by Reynold and Trehan (2001) in which some programme participants found the un-structured participative learning environment alienating, some felt uncomfortable expressing their feelings and a few wrestled with a feeling of being ‘coerced’ into self-disclosure. There are also similarities with some of Sinclair’s (2007) research subjects who reacted defensively, refusing invitations to participate in reflective activities, sometimes staying silent or storming out of the room.

#### **7.1.4 Reassuring variations**

The findings for the remaining four research subjects, Ben, Chris, Edward and James, do not map neatly onto either of Vince’s (1996) cycles of emotions. Their rare references to troubling emotions typically relate to external factors such as stressful

workloads or writing assessed assignments. To some extent they talked about resisting self-reflection but not in the anxiety-laden and highly defensive manner described by Lucy. For example, as Chris began to talk about the philosophical side of leadership which he called “quite deadly” he said:

“...I haven’t really dealt with it at all. I’ve done what I do quite often with quite a lot of things, I just close them off and pretend they’re not there and come back to it another time, and think, well, that’s just too difficult for me.” (Chris 2005)

When his confidence began to wobble, Edward talked about how he “rationalised the whole thing” to restore his sense of well-being. Ben also gave the impression that he avoided getting into anything too personal. This group of subjects talked very little about their emotions and when they did, it was largely to express their enjoyment of the learning process and their appreciation for what they had learned. Many of their positive emotions were related to the learning activities themselves which were described as confidence building, rewarding and fun while others were related to the course materials which were described as stimulating and fascinating. What can be said about these findings? Firstly it is reassuring to observe that accounts of real-life experiences cannot always be aligned with tidy diagrammatic representations! How dull and predictable the world would be if our experiences could all be portrayed by neat little models. Secondly, these subjects are all male hence they may have constructed their accounts with a female researcher in a manner which edited out any troubling emotions originally attributed to their learning. Thirdly, three of these four subjects had spent their working lives in large male-dominated traditional organisations where feelings were rarely expressed. Hence a number of learned constraints may have impacted on their behaviour as they participated within the learning group and in the research interviews.

“The same process that banishes emotion from work organisations affects the learning group.” (Vince, 1996, p124)

Beyond these observations, the accounts provided by Ben, Chris, Edward and James convey the impression that they each ‘paddled around the edges’ rather than fully immersing themselves in the learning experience. They each talked about new ways of thinking or new ideas they had learned, saying very little in terms of what they had learned about themselves. James in particular referred several times to different schools of thought, which had intrigued him, and Edward talked about having his eyes opened to different ways of thinking about leadership. Ben talked excitedly about the new ideas and bodies of literature which he has encountered while Chris majored on feeling he has permission to think outside of the prescriptive approaches which he believed dominated within his organisation. Thus there is an emphasis on the rational and intellectual aspects of learning as in Revans’ (1983) original task-oriented model of action learning. This exclusion or avoidance of the emotional or political aspects of a learning process is nothing new, as Vince observed:

“Our tendency as learners to avoid and deny the emotional and political aspects of management learning means that thinking about experience tends to dominate.” (Vince, 1996, p119)

In this context the word political means the social power relations (the unequal positioning) between participants in the learning group. This flows from their role/status in society, in their employing organisation and hence their perceived positioning in relation to each other (ibid). Therefore, whilst these research subjects appear to have learned new and interesting ideas, and reflected on their experiences they seem to have avoided, ignored or not been guided towards much deeper learning

about themselves and their underlying assumptions about organisations and managerial work.

## **7.2 Transfer of learning - emotions in the workplace**

What emotions did the research subjects associate with their transfer of learning into the workplace? Interpretation of the findings presented in section 6.3 requires an acknowledgment that the emotions attributed to these experiences might conceivably depend upon a multitude of factors, including who the research subjects are (age, maturity, experience, gender etc) the nature of their role, the organisation in which they work, the nature of changes in practice which they try to introduce, their relationships with colleagues, the extent to which change and new ideas are welcomed in their context and the extent to which there is a dominant discourse which is enforced. Also as before, their accounts may have been influenced by their willingness to discuss their emotions with a female researcher.

As discussed earlier, there has been considerable speculation but very little research into the emotional consequences in the workplace, for practicing managers participating in critical postgraduate management education, some of which has been informed by theory and research in the field of adult education. Proponents of management education involving critical perspectives have speculated that managers participating in such programmes might experience emotional difficulties back in their workplace including isolation from their peers (Burgoyne and Reynolds 1997), being undermined by resistant or disinterested colleagues (Reynolds, 1999), becoming disillusioned because of how they are required to behave (Burgoyne and Reynolds 1997), suffering guilt and cynicism (Willmott, 1994) or simply struggling to practice with personal coherence and integrity (Fenwick, 2005). Contrary to these bleak

predictions, it has been suggested that managers might be more relaxed and happier about their work (Watson, 2001b) an idea which has been reinforced by a handful of research findings (Rigg and Trehan, 2004). How do these conjectures and earlier studies compare with my research findings?

### **7.2.1 Anxiety and answers**

One of the most striking outcomes from this research is the number of research subjects who report making changes in their working practices as a result of their learning experience, and who associated these changes with a greater sense of well-being. For several research subjects this sense of well-being was characterised by a reduction in their anxiety, anger, frustration and irritation and an increase in their happiness, contentment and enthrallment in their work. These shifts from negative to positive emotions associated with liberation from unhelpful ways of thinking and acting is most clearly displayed in the illustrations from Amy, Hugh, Fiona, Kim and Gill presented in Section 6.3. Such liberation was evident in workplace scenarios in which they described two key changes. Firstly, relinquishing thought processes and techniques designed to control events and secondly, liberation from being perceived as the expert who was supposed to know the answer.

Among these findings the most striking was Hugh's abandonment of the change management methodology which he had previously created and introduced within his organisation. In its place Hugh described adopting an intelligent blend of structure and spontaneity informed by his new focus on people and relationships rather than procedures. As a result Hugh described his migration from a warrior-like approach which he associated with anger and irritation, towards a people-oriented approach which he associated feeling calm, relaxed and more patient – perhaps contentment,

satisfaction and optimism if expressed in terms of emotions. He described shaping his work with senior teams in a way which left space for ideas to emerge and conversations to flow rather than “slicing and dicing every minute of the way” as in his previous tightly controlled approach:

“I guess one of the things I notice is my comfort with 'not knowing'. What I mean by this is that although I still design a workshop, I do it now with space for things to emerge, and I rejoice rather than become frustrated when I throw the design in the trash can after thirty minutes! I believe that being informed by the complexity school has brought this relaxation, and ended the need to control every moment.” (Hugh, 2007)

Thus Hugh was explicit about his migration away from control and towards emergence as a fundamental principle informing his work.

Like Hugh, Fiona talked about the satisfaction and delight which she derived from working in an emergent way, and contrasted this with anxiety-provoking situations in which she was required to know the answer:

“It’s satisfying, it’s exciting and there’s something about it that is less stressful than when you trying to do it the other way of working, because when you’re trying to be the expert, you’re constantly having to impress the client with your expertise and act like you know the answer and come up with ...sort of... pull rabbits out of hats... which is more stressful than being able to be side by side with the client and working with them to find solutions. Your expertise is more about the process, rather than having the expertise about the answer.” (Fiona, 2007)

Gill talked about letting go of the “need to know” and as a result she described becoming more enthusiastic and enthralled when working with colleagues. Kim gave

similar descriptions of her new working practices and her improved sense of self-awareness which she associated with reduced anxiety, increased happiness and greater pride in what she had to offer. However, in order to be free to operate in a new way, Kim moved to a new role in a different organisation, escaping from the structured project management processes which she felt dominated her original working environment, and which constrained and frustrated her.

In daily encounters, such as team meetings, each of these research subjects relished the opportunity to interact with people without an agenda, a plan, an issues log or any other structuring device. Instead, they described paying much more attention to the social aspects of their work including conversations and the relationships between people, regarding these as key to achieving work-related outcomes rather than simply opportunities to be sociable. There is possibly a connection between this re-orientation and another set of illustrations provided by three of the research subjects, Hugh, Kim and Amy, in which they described focusing much less on their own individual achievements and increasing their happiness and contentment as a result. Hugh described being content to contribute towards “building cathedrals” by which he meant making a contribution but recognising that other people might see complex projects through to completion without him. Likewise Kim talked about her pride in beginning something which others might sustain and conclude, in contrast to her earlier striving to prove herself. Similarly Amy was content with being a catalyst for change rather than the person taking the credit. These findings are consistent with Watson’s (2001b) predictions that managers would be more relaxed and happier about their work as a result of participating in critical studies. There are also parallels with

findings from Rigg and Trehan (2004) who reported one manager feeling happier as a result of giving herself permission to be a real live fallible person!

Fiona and Hugh gave no indication that they had been troubled by their efforts to do things differently. Hugh described how some senior managers were initially confused by some of his practices, for example holding an all-day workshop without an agenda, but he appears to have quietly persisted and won them over. However, for the other research subjects who changed their practice, the transfer of learning generated some difficult emotions, as discussed in the following section.

### **7.2.2 The darker side**

In contrast to the positive findings discussed in the previous section, some of the findings echo Burgoyne and Reynolds' (1997) predictions about managers becoming disillusioned with their employer because of the way they are required to behave.

Amy described changing her working practices to such an extent that she began to challenge the accepted way of doing things within her organization, leading to a point where she associated a sense of despair and isolation with her situation:

“...I really just didn't want to go forward and I felt as if I was in a black hole. I think it was the thought of all that structure and control in the organization ahead of me, and it was something that at the time I was really trying to kick against and not do it.” (Amy, 2005)

Amy successfully negotiated a transfer from her existing role to another role within the same organisation, in order to be in an environment where she could operate in a less controlling and more people-oriented way. Kim also told her story in this way, describing herself as a *misfit*, and an *irritating enigma* in 2005. Kim expressed her exasperation with having to conform to the dominant culture which she depicted as

having tick-box processes and an operational viewpoint “linear, cause and affect mindset and command and control leadership”. As she approached the end of her learning experience Kim’s sense of being a misfit escalated further:

“So am I different – yes. It is an issue – yes, it absolutely is an issue.” (Kim, 2005)

By 2007, Kim had left her original employer to secure a new role in a different organisation where she believed her new practices were welcomed.

Like the research subjects featured earlier, Ian adopted new practices informed by complexity sciences and relational psychology, but unlike the others, he did not associate this transfer of learning with increases in happiness and a reduction in his anxiety. Instead he described experiencing intense frustration as a result of trying to work in a way which challenged conventions within his organisation:

“It’s proving really difficult to engage in a more fluid, emergent, organic model within a very machine-like structure.” (Ian, 2005)

Having developed his self-awareness during the programme Ian portrayed himself as more able to deal with these emotional low points. However, consistent with Fenwick’s (2005) concerns, he described struggling to maintain his sense of coherence and authenticity as he worked with the contradictions between his own thinking and the environment in which he was embedded:

“So my challenge is how do I stand in the world’s rationality and complexity, remain sane, remain in a job, and remain true to my principles, and that’s an incredible challenge.” (Ian, 2005)

Despite conveying his enthusiasm in relation to his new approaches, Ian's account reflects Czarniawska's (2003) warning about becoming "sadder but wiser" as his sense of potency seems to fade with the dawning of deeper understanding:

"One of the things that <business school> has done for me which is not necessarily a good thing is you start to question your own individual ability to make a difference and that's really good if you're very arrogant, and it's not that good if you've come to a place of humility." (Ian, 2005)

By 2007 Ian had left his employer to work as an independent consultant.

Also consistent with Burgoyne and Reynolds' (1997) predictions, Gill recognised the risk of becoming an isolated "lone voice" and being "ejected by the system" if she offered too much change. Similarly Chris described feeling isolated from his peers as he challenged conventions within his organisation. Chris did not attribute significant changes in his practice to his learning experience but instead he talked about how the programme and his recent promotion gave him confidence to further develop his maverick tendencies. Chris talked about the loneliness and frequent exhaustion which this generated, portraying his colleagues as confused by his behaviour as in this illustration:

"Chris has moved over to the dark side....The dark side meaning in a 'star wars' sense – don't know where he is, what he's doing, why he's there, but he's definitely there not doing what we normally do." (Chris, 2005)

Later in 2007, Chris described the anger and insult he experienced during a recent appraisal in which his working practices seemed to have been misunderstood by his line manager. Accused of employing "an awful lot of management bollocks" Chris described reacting to this insult by taking his line manager to task, eventually convincing his manager that he had in fact been delivering positive results.

### **7.2.3 Optimistic outcomes**

In addition to the positive and troubling emotions which several research subjects associated with changes in their practice, the findings also include accounts from subjects who did not necessarily implement significant changes but who nevertheless, spoke about the emotions they associated with transferring various forms of learning into the workplace. For example, Amy, Fiona, Gill and Ian each talked about taking pleasure in their new insights into their own and other people's behaviour. Amy seemed particularly excited and delighted by her new insights which she believed had become regular occurrences "...things like that happen all the time now" (Amy, 2005). Kim and Lucy each spoke about some of their existing practices being validated and enhanced by the learning process which increased their pride as they transferred this learning into their practice. Kim also spoke about how this reduced her anger and disappointment which she had previously associated with not feeling valued for her work. Another group of research subjects, including Ian, James, Dave and Edward each described how they felt more able to understand and be more tolerant of other people's experiences and perspectives, as a result of which they became less angry, frustrated, or annoyed when working with other people. For example, Edward referred several times to situations in which he felt less need to force his point of view on people, to win arguments, instead preferring to walk away and not worry about differences of opinion. Dave also talked in terms of no longer feeling the need to press his opinion on others. Also, Ben spoke about having pride in his new ability to evaluate work-related issues from a broader range of perspectives and to recognise his own and other people's assumptions.

### **7.3 Transfer of learning - discourses and practice**

What changes in conceptual frames of reference and changes in practice did the research subjects attribute to their learning experience? Furthermore, what does their language tell us about the conceptual frames of reference which informed their thinking and practice? Interpretation of the findings in section 6.3 begins to answer these questions in this section by focusing on those research subjects whose descriptions of changes in their practice contained one significant similarity, this being, a migration away from the dominant conception of managerial work as depicted in Watson's (2002) systems-control framework. This similarity within their stories is significant because the dominant conception of managerial work is central to debates on the alleged failings of management and management education and the disconnection between teaching and practice. If the selected research subjects described moving away from this dominant discourse then what did they claim to have migrated towards?

There are three things to keep in mind when reading this section. First, it features only those research subjects whose accounts fulfil the criteria outlined above, this being Amy, Fiona, Gill, Hugh, Ian and Kim. It is possible that some of the other research subjects made similar changes in their practice but my analysis and interpretation of the interview transcripts did not support this conclusion. Secondly it is important to remain aware that there is a possible disconnection between each research subject's ability to use a new language and their ability to enact it. The research subjects were not observed in their workplace hence there is no visual evidence that they were actually behaving, either before or after their learning experiences, in the ways which they described during the interviews. However, as

discussed in Chapter 5, these findings focus on managerial practice *as experienced and described by each research subject* without necessarily according this the status of authentic reality. The third thing to keep in mind is that we do not have any first-hand knowledge of the context in which each research subject was operating. This means that we cannot know the meaning which others attributed to the research subjects' actions. As discussed within the literature review, a key weakness of earlier research into the observable behaviour of managers was that they failed to take into account how those behaviours would be interpreted by others within the organisational context. In this research study, the focus is on the research subjects' own descriptions of their behaviour, the intentions they attributed to this behaviour and the contrast between this and their thinking and practice prior to their learning experience.

A key concept throughout this section is *discourse* which has both descriptive and active capacities as discussed in Chapter 2. The findings in this section portray the new discursive resources which the selected research subjects have adopted as a way of describing and understanding their managerial practices. These discursive resources provide an insight into the behaviours, beliefs, assumptions, personal qualities and skills which these research subjects associated with their practice. Furthermore, since actions (*what we do*) are shaped (*constituted*) by the ideas or concepts in our minds, it is reasonable to suggest that these discursive resources were active in shaping the unobserved working practices of these research subjects.

### **7.3.1 New foundations**

Interpretation of the findings presented in Chapter 6, provides illustrations of six research subjects (Amy, Fiona, Gill, Hugh, Ian and Kim) each of whom described

migrating away from the dominant discourse on managerial work portrayed in Watson's (2002) systems-control thinking. More specifically, these research subjects talked about moving away from rationality and control, towards practices focused on social interactions as the primary means of managerial work. However, while some research subjects described changes in their thinking and practice, others portrayed these changes as an affirmation of their intuitive frames of reference and rejection of other frames of reference which had been imposed on them. Hence the notion of *change* includes both the idea of learning something completely new as well as the idea of removing externally imposed ideas.

### ***7.3.1.1 Organisations***

The findings presented in section 6.2 demonstrate that two of the selected research subjects, Hugh and Ian, attributed to their learning experiences a fundamental change in their understanding of organisations. The source literature shows that the faculty associated with both research sites, promoted an understanding of organisations as a gathering of people engaged in complex social processes towards a variety of outcomes. This understanding contrasts with the more orthodox view that organisations are machine-like systems designed to convert inputs, such as raw materials and people, into outputs. Using Watson's (2002) typology it can be said that both programmes promoted an understanding of organisations consistent with the *process-relational* perspective rather than one consistent with *systems-control* thinking. In Chapter 4 these two discourses were reviewed and contrasted in order to highlight the different ontological status of organisations embedded within each of them. Underpinned by a scientific paradigm and orthodox behaviourist psychology, systems-control thinking gives an organisation the appearance of an entity separate from the people who engage in its activities, thus it appears to have an objective

existence which is typically referred to as being *reified* or *personified* (Watson, 2002). In contrast the *process-relational* perspective underpinned by a post-structural perspective and relational psychology avoids such reification. Hence organisations are regarded as social constructions enacted through the processes and relationships in which people engage to complete shared tasks in the name of the organisation.

Both Ian and Hugh described a shift in their understanding of an organisation. Ian used the word *epiphany* to describe the sudden and profound shift in his understanding when he realised that organisations and his work were all about people, having previously talked about them in terms of restructuring, designing, functions and so on. Ian also used words such as fluid, organic and emergent to describe his new approach to strategy, contrasting this with the “machine-like structure” in which he perceived he was working. Similarly, Hugh (2005) referred to a paradigm shift leading to “a totally changed belief in how organisations work”. Hugh elaborated on this paradigm shift by talking about how he rejected the rigidity his mechanistic change management methodology, preferring instead to invest his time in conversations and relationships, creating relatively unstructured encounters with colleagues in order to allow ideas and solutions to emerge. Through these findings both Hugh and Ian articulated a shift in their understanding of the ontological status of organisations, from a reified entity (organisation) to an ongoing social process (organising). The findings for both of these research subjects show that their thinking migrated away from the machine metaphor for an *organisation* underpinning the dominant discourse on management, and towards the complexity informed discourse in which social interactions, primarily conversations and relationships, are the means by which *organising* takes place (Stacey *et al*, 2000). The significance of this ontological shift resides in its

implications for the nature of managerial work. If managing is understood as an ongoing process focusing on relationships and social interactions to achieve shared outcomes, then this has implications for the skills, behaviours, knowledge, beliefs and assumptions associated with being an effective manager. Watson's (2002) *process-relational* perspective represents a coherent combination of contemporary social theory into a discourse which constructs such an understanding of managerial practice.

### **7.3.1.2 Human individuality and agency**

The findings presented in Sections 6.2 and 6.3 show that five of the selected research subjects, Fiona, Gill, Ian, Hugh and Kim attributed to their learning experiences a new perspective on the nature of people with implications for their understanding of the location of agency. As discussed in Chapter 4, *system-control thinking* embodies a way of thinking which is rooted in the scientific paradigm and behaviourist psychology, such that agency is deemed to be located within an individual who operates on an external world (Watson, 2002). Thus a manager is perceived to be an objective and 'choosing' agent, separate to the organisation, capable of engaging in a rational design and control activity which can align worker activity with organisational goals. Contrast this with the *process-relational* perspective which embodies a post-structural paradigm and an understanding of human individuality rooted in relational psychology, such that agency is deemed to reside within relationships rather than being located within individuals (Stacey *et al*, 2000; Watson, 2002). From this perspective, the manager is embedded within the organisation and managerial work is regarded as a social process involving ongoing organising, shaping, exchanging and trading in order to achieve negotiated order (Watson, 2002). Thus social interactions, primarily conversations and relationships, are the means by which work gets done and also the means through which people construct their

individual and collective identities. In this context identity is an important concept because people are understood to be constructing their sense of themselves (*their identity*) while at work, in addition to trading their time and skills in return for financial reward. In essence, these two discourses reflect a different understanding of the ontological status of human individuality, with systems-control thinking defining it as *fixed* and the process-relational perspective defining it as *relational*.

None of the research subjects talked explicitly about changes in their understanding of the ontological status of human individuality, why would they, since this is a rather technical phrase for anyone outside of academia. However, five of the selected research subjects gave examples which conveyed their new found faith in an interdependent and immersed approach to their work, utilising conversations and relationships as the primary means of enacting their employed roles. The research subjects did not talk about engaging in conversations just because they were spending more time simply being sociable. Instead they described these conversations as part of broader social dynamic through which they believed change could be generated and mutual understandings could be developed and shared. Hence it is argued that these research subjects have adopted a relational understanding of human individuality. For example, in Section 6.3.1 Hugh made several references to investing his time in conversations and seeing these in a new light as beneficial and meaningful contributions to outcomes. He associated them with an entirely new way of working which flowed from a profound change in his understanding of organisations, people and hence his work.

“When I talk about a paradigm shift I mean in quite simple ways but also in very profound ways; you know, the way the world works and my place and my role in it.” (Hugh, 2005)

As a key example, Hugh described inviting a group of senior managers into an all day workshop which he arranged so that they could “have a conversation” and “work with what emerges”, and then he contrasted this with his original highly structured approach to facilitating management team meetings. He also reflected on why unstructured ad hoc conversations are generally regarded as “inconsequential” and not real work in contrast to his own new belief in their importance and value.

Similar examples were provided by the other selected research subjects. For example, in Section 6.3.2 Kim described how she intuitively understood that “the way people relate to each other creates change” but as a result of her Masters she said she developed an appreciation of how to use conversations in a more deliberate and careful way in order to achieve change:

“...It’s not just about having any conversation, but it’s about having different conversations that creates the shift.” (Kim, 2007)

As a result Kim portrayed herself as a facilitator with responsibility for making such conversations possible:

“...creating an environment in which people can have what I will call ‘real conversations’...” (Kim, 2007)

Like Kim, Fiona talked about being responsible for delivering change and when asked how her own practice had changed she rehearsed the complexity informed approach, focusing on the impact of social interaction:

“...this has changed my approach to work...Now I think I’m approaching it from the point of view that everything I do and every conversation I have is the change process and yes we do little plans with bar charts and stuff and I know that’s helpful and useful but that isn’t it.” (Fiona, 2005)

Informed by the same discourse, Gill articulated her new approach to organisational change in a similar way:

“...But I think the complexity approach has informed this, that change happens in relationship, it happens through different kinds of conversations...” (Gill, 2005)

Likewise, Ian talked about facilitating conversations and working with people in divergent and exploratory discussions rather than the more conventional convergent decision focused meetings. He attributed this new approach to his epiphany, very early in the programme in which he suddenly realised “all my work’s been about people.” Among his successes Ian described reaching a point where “there was a lot of connection going on” and “people were starting to have different kinds of conversations”. He expressed his belief in the importance of high quality of conversations as the means to achieve organisational outcomes:

“The end is about getting better quality conversations, and some people say that’s just a means. ... I’m prepared on faith to say if the conversation is higher quality, the means will be better. I don’t need any more proof than that. But that’s my kind of logic.” (Ian, 2005)

As an example of this shift in the quality of conversations, Ian told a story about a difficult relationship with a member of his team. He described resolving this problem by investing in the relationship, being open and honest, taking risks and talking about difficulties instead of adopting a transactional ‘manager to employee’ orientation.

The findings presented in Chapter 6 and interpreted in this section show that Fiona, Gill, Ian, Hugh and Kim each portrayed their new working practices as ones in which they deliberately immersed themselves in social encounters, regarding these as the most effective way of achieving the outcomes associated with their roles. Influenced

by the complexity approach to change, they each depicted conversations and relationships as the means through which they believed change could be generated. Instead of being the heroic change agent, they each portrayed themselves as a facilitator with responsibility for engaging in and supporting high quality exploratory conversations which allowed ideas and solutions to emerge. They talked about resisting the temptation or pressure to come up with answers and solutions, and they recognised that this required them to be honest and humble about the uncertainties ahead. Hugh was the most explicit about the contrast between this new facilitative approach and his previous heroic orientation:

“...you know I used to want to change the whole of <organisation> overnight and do it single-handedly and do it myself, and my way was right,” (Hugh, 2005)

Likewise, Kim gave examples of being much more collaborative in contrast to her earlier work in which she described seeking personal recognition and being very focused on striving to prove herself. So, consistent with Watson's (2002) process-relational perspective, these research subjects described changing their practice to become an immersed and socially-oriented interdependent facilitator instead of being an objective and self-centred individual hero.

### ***7.3.1.3 Rationality and control***

The findings presented in section 6.3 provide illustrations of Amy, Hugh, Kim, Ian, Fiona and Gill each rejecting control as the primary means of achieving organisational outcomes. Kim argued that she never believed in the linear, structured processes which she was required to follow, thus portraying herself as liberated from externally imposed requirements, whereas the other subjects described how their thinking had changed. These illustrations were discussed in chapter 6 hence to some extent they require little further interpretation. However, if we refer back to the literature review,

a number of questions emerge, which require us to pay a little bit more attention to these seemingly obvious findings.

An extensive review of the literature on leadership confirms that it has largely eschewed notions of control in favour of achieving shared outcomes via other means including inspiration, commitment and trust (Bolden, 2004). This is consistent with rhetoric from scholars (e.g. Zaleznik, 1977; Bennis and Nanus, 1985; Bryman, 1986; Kotter, 1990) have encouraged us to associate control, rationality, operational goals, order, stability and consistency with *management* and vision, change, creativity, intuition and strategy with *leadership*. However, despite their efforts to pin *control* onto management, the discourse on managerial work rejected control as the primary means of achieving organisational outcomes, many years ago, replacing it with recommendations for managers to think in terms of worker self-control (Drucker, 1954), empowerment (Kanter, 1983) and then trust (Handy, 1985). So, why do we have six experienced management practitioners talking about relinquishing their control oriented methods and processes, in the early 21<sup>st</sup> century? Whether they think of themselves as managers doing management or leaders doing leadership, these long running discourses suggest that none of them would be thinking or acting in a control oriented manner, in any event. However, in the findings the research subjects clearly portrayed themselves as migrating away from control oriented approaches, which originated from either their own preferences or local practices. The persistence of control, within organisational processes and in the minds of managers, might explain why scholars continue to call for them to understand the complex nature of organisations and let go of their efforts to be in control:

“...the most important product of management education should be an insistence that the student recognize that he or she is not in control and instead begin to develop the habits of mind and action consistent with the reality of organizational dependencies.” (Roberts, 1996 p58)

Roberts would be pleased with the six research subjects featured in this section who appear to satisfy this learning outcome.

In order to interpret the apparent and puzzling contradiction between these research findings and the discourses on management and leadership, it is useful to regard trust-based approaches to either management or leadership, as normative theories, meaning a description of what some people believe ought to be happening (Marturano, 2004). These theories possibly express Western society's growing desire for an emotional connection with their work (Yukl, 2002), this being a desire to be led (understood to mean *inspire me*) rather than a desire to be managed (understood to mean *control me*). However, as argued in chapter 1, specific social phenomena called management and leadership do not exist and instead they represent our attempts to name peoples' responses to the ongoing challenge of how to organise and motivate groups of people to achieve shared outcomes in the name of a particular organisation. Several of the research subjects in this study were involved in co-ordinating major change programmes within their organisations but debating whether this should be called management or leadership adds nothing to our understanding of their practice. Instead we can gain greater insight by understanding the mental models which actively inform their practice. The findings have illustrated fundamental shifts in their mental models, or more specifically their understanding of the ontological status of organisations and human individuality, causing them to re-think how they approach their work.

Therefore the discourses which seek to differentiate leadership from management, and to associate control only with the latter, are a misleading smokescreen which diverts attention away from these much more fundamental ontological issues.

### **7.3.2 From masculine towards feminine**

Interpretation of the working practices described by the selected research subjects in Sections 6.2 and 6.3, suggests that they have migrated away from perspectives, skills and behaviours culturally associated with masculinity and towards those associated with femininity. The connections between masculinity and the dominant discourse on managerial work were discussed in chapter 4, which highlighted how the literature on management and management education has promoted masculine imagery through words such as command, control, independence, ‘power over’, hero, status, authority, autonomy, achievement, competition, aggression and technical competence (Collinson and Hearn 1994, 1996, 2000; Fletcher, 2004; Marshall, 1984). This was contrasted with calls for a new management style embodying skills and behaviours culturally associated with femininity (e.g. Alvesson, 1998; Kanter, 1989; Wajcman, 1998; Wheatley, 1999). The language used to describe such skills and behaviours has included words such as collective, mutual, inclusion, connection, affiliation, social, ‘power with’, interdependence, relationships, enabling, collaboration, honesty, understanding, authenticity, learning and growth (Helgesen, 1995; Marshall, 1984; Fletcher, 2004). Fletcher (2004) named these two discourses heroic (*masculine*) and post-heroic (*feminine*) leadership, which have many parallels with systems-control thinking and the process-relational perspective respectively (Watson, 2002).

Fletcher’s (1999) research into relational practice was reviewed back in Chapter 4 but the focus then was on the way relational practice ‘gets disappeared’ in contexts where a masculine *logic of effectiveness* prevails. However, the earlier review did not

feature the skills, activities and outcomes associated with relational practice hence these are featured here as this enables further interpretation of the research findings.

Fletcher's (1999) definition of relational practice has much in common with Watson's (2002) *process-relational perspective* in that they both embody a relational understanding of human individuality and they both view managerial work as an ongoing and interdependent social process. However, Fletcher's (1999) relational practice pays attention to a broader range of outcomes by emphasising outcomes embedded in people (such as personal development – both emotional and intellectual) and outcomes embedded in social situations (such as good working relationships). Hence the relational *logic of effectiveness* is one which recognises that “Growth, achievement and effectiveness occur best in a context of connection” and “Interdependence is a powerful vs. deficient state” (Fletcher, 1999 p87). The skills involved in relational practice include empathetic competence, emotional competence (understand and interpret emotional data), authenticity (ability to access own thoughts/feelings), vulnerability (ability to admit to not knowing), holistic thinking (ability to synthesise thoughts, feelings and action), fluid expertise (move easily from expert to non-expert), and response/ability (engage with others whilst holding onto own reality) (adapted from Fletcher, 1999 p86). The four main activities involved in relational practice are *preserving (task)*, *creating team*, *mutual empowering (others)*, and *self-achieving* each of which involves the interweaving of *private sphere* values and behaviours into the workplace. For example they include re-connecting broken relationships, affirming individual uniqueness, absorbing stress, protecting others, asking for help, placing project needs and other people's needs ahead of career concerns.

The findings from this research provide some illustrations of relational practice and they also provide examples of relational practitioners being accepted and recognised as valued, and not valued, within their work environment. The findings presented earlier in this section featured six of the research subjects in this study, two men and four women, who described migrating towards forms of practice which had much in common with the process-relational perspective (Watson, 2002). Furthermore, having now reviewed the skills and behaviours involved in relational practice (Fletcher, 1999) it is possible to see several illustrations of these within the findings. For example Hugh, Kim, Amy, Ian, Fiona and Gill each talked about being open and comfortable with their *vulnerability*, willing to tolerate not knowing answers to work related issues with no loss of self-esteem. Hugh described how he had shifted from a warrior-like focus on individual achievements towards being content with playing his part in collective accomplishment, which he described as ‘building cathedrals’. Fiona gave examples of *holistic thinking* as she described noticing what was happening in meetings and using her interpretation of people’s language, emotions and behaviours to inform her responses. Gill illustrated her *emotional competence* as she described accessing her belly and heart to inform her practice. Ian illustrated his *empathetic competence* as he talked about entering into the perspective of his stressed marketing director. Ian also talked about shifting from his complexity informed world into a rational world in order to converse with his country manager, an example of *response/ability*. Likewise Amy learned to talk to her boss in a way which he could understand. Each of these research subjects expressed belief and confidence in their new way of working and, with the exception of Ian, they continued to sustain and develop these practices between the interviews in 2005 and 2007.

Hence the findings show that the selected research subjects talked about their new practices using language and concepts which are culturally associated with femininity. This included Hugh rejecting his rigid mechanistic methodology, placing a high value on the relational and conversational aspects of his work, no longer acting like a warrior (*hero*) and instead investing his time in connection and collective endeavours which he referred to as “building cathedrals”. Ian talked about facilitating high quality conversations, being open, honest, working with people and a lot of connecting going on. Fiona talked about having lots of conversations, noticing relationships between people, enquiring co-operatively and feeling much more engaged. Curiously Amy said “my natural skills are around people and communications” but she appears to have denied or hidden these as she believed they were not seen as valuable in terms of performance and career progression. She said that her skills were regarded as “pink and fluffy nonsense” in contrast to the “hard business deliverables” recognised and expected within her department. In her interview in 2005 Amy talked about her need for control and how she had worked for 18 years in a “very controlling, conditioning, structured atmosphere” which had exacerbated her natural tendencies to be highly organised, structured and controlling. Amy described rejecting these controlling tendencies and desire for status, and moving towards understanding, sharing and inputting ideas. These findings for Amy are similar to those reported by Rigg and Trehan (2004) in which a female manager, who had previously emphasized the masculine facets of her personality, dropped the masculine ‘act’, adopted a non-masculine role model and trusted her own instincts. Much of Kim’s story was also about learning to trust her instincts as the learning process confirmed her pre-existing belief in the connection between the quality of

human relationships and the generation of change. Kim portrayed herself as someone who focused on connecting people, working collectively, being open with information, paying attention to the way people relate all of which contrasted with her earlier anxieties about striving to prove herself as an individual. Gill also spoke about her practice being conversational, supporting spaces between people, focusing on the quality of relationships and generating courageous creative conversations.

Furthermore, she described learning to place a much higher value on her intuition and ability to relate to people, aspects of her practice which she appeared to have previously denied or marginalised:

“I’ve noticed what I bring is that more intuitive capacity, I think the relational and actually giving more value to that rather than oh, because she’s a woman she’s kind of good at the more fluffy side. Actually that is kind of core to my practice, and that ability to relate, that ability to really trust your intuition and to access that. So I think bringing more of myself, bringing more of myself into what I do I think is part of it.” (Gill, 2005)

What is particularly interesting about these findings, is that the accounts generated by three of the research subjects (Hugh, Ian and Amy) embody a migration from heroic (masculine) to post-heroic (feminine) beliefs, skills and practices whereas the stories told by the other three selected subjects (Fiona, Gill and Kim) seem to be more about affirming post-heroic (feminine) beliefs and skills which were already within them and then developing the associated practices. The gender mix is noticeable although it would be unfair to imply that men’s default approach to managerial work is necessarily masculine and women’s necessarily feminine. Amy’s account runs contrary to such simplistic suppositions. However, a more robust theory, grounded in the findings from this research, would be that a post-heroic approach to managerial

work is more likely to be innate in women and therefore in need of affirmation and further development, and less likely to be innate in men and therefore it requires learning and development. If a post-heroic approach to managerial work is desirable within contemporary organisations, then this brings us back to the so-called *female advantage discourse* (Helgesen, 1995). However, Fletcher (1999) critiqued this discourse on the basis that post-heroic leadership or management is not recognized and rewarded in many Western work organisations because it violates the dominant, masculine, logic of effectiveness. Furthermore, Fletcher (2004) argues that men and women enacting a post-heroic approach are likely to experience differential responses, with men being recognised for doing ‘participative leadership’ but women not being recognised as doing leadership at all, because their behaviour is conflated with invisible, selfless giving. So, how did the male and female research subjects fare in this research study as they experimented with a post-heroic approach within their organisations? Were the men recognised for their work and the women ignored? To what extent did the findings from this study confirm or contest Fletcher’s (2004) theory? These social consequences and others are discussed in the following section.

### **7.3.3 Social consequences**

What reactions from colleagues do the research subjects describe experiencing as they transfer their learning into the workplace? This section addresses this question by interpreting findings in section 6.3, focusing on those research subjects who described changing their practice in some way and who associated these changes with reactions from their colleagues, either positive or negative.

As before, there are several things to keep in mind when reading this section. First, it features only those research subjects whose accounts fulfil the criteria outlined above,

this being Amy, Chris, Edward, Fiona, Gill, Hugh, Ian, James and Kim. It is possible that the remaining research subjects, Ben, Dave and Lucy also made changes which prompted reactions from their colleagues, but my analysis and interpretation of the interview transcripts did not support this conclusion. Secondly, we do not have any first-hand knowledge of the context in which each research subject was operating. This means that we do not know the nature of the discourses which were dominant, the behaviours which were regarded as normal or deviant, or the extent to which the environment was one in which people welcomed new ideas and change. Hence our understanding of the *context is as experienced and described by each research subject*. For example, if they depicted the environment as one in which structured project management processes were rigidly enforced, then this is accepted as their version of reality without according it the status of authentic reality. Similarly we cannot know the authenticity of the reactions which each research subject attributed to their colleagues.

Two key concepts are employed throughout this section, *organisational culture* and *norms of behaviour*. Some of the research subjects described changing their fundamental *assumptions about the nature of organisations and people*, as well as changing their *behaviours* and use of *language*. These are all elements of the *culture* within a particular area of social life, such as a work organisation or a professional grouping such as managers (Watson, 2002), and defined as follows:

“The set of meanings shared by members of a human grouping which defines what is good and bad, right and wrong and consequently defines appropriate ways for members of that group to think and behave.” (Watson, 2002 p112)

Assumptions about the nature of organisations and people form part of the invisible elements of the culture within an organisation, while language and behaviours are among the visible elements of the culture such that regularly occurring *norms of behaviour* become established as ‘the way things are done’ around here (Watson, 2002 p472). These are important concepts for this research study because the changes in assumptions, behaviours and language described by the research subjects, lead to the possibility of the subjects talking and behaving contrary to the prevailing culture within their organisation and also within their peer group (e.g. senior managers). Therefore, if they behave contrary to the prevailing culture, how do their colleagues react, how do they cope with these reactions and are they able to sustain a new model for ‘how things are done’?

### ***7.3.3.1 Sustaining change***

Several of the research subjects described being able to enact their role in new ways without feeling constrained by colleagues or workplace conventions. This included five of the research subjects featured in section 7.3 (Amy, Fiona, Gill, Hugh and Kim) as well as Chris. What is particularly interesting about these findings is that in order to sustain these changes, Amy moved to a completely different role and Kim moved to a new employer while Fiona and Gill began working with new clients. Hence, all of the women featured within this section were working in a new environment either when they were interviewed in mid 2005 (Amy) or by the time they were interviewed again in late 2007 (Fiona, Gill and Kim). In contrast both Hugh and Chris remained with the same employer throughout.

In order to interpret these findings it is illuminating to draw on research by Aileen Lawless (2008), which focused on students participating in MA in Human Resource

Development at Liverpool John Moores University. The programme design involved action learning and critical reflection and while the participants seemed able to utilise critical perspectives within their conversations, Lawless believed that they were constrained from acting on these within their workplace due to the ‘dominant repertoire’ within their organisation:

“From a community of practice perspective people construct identities as they become part of a community. Therefore, the ability to read the local context and to act in ways that are valued by other members of the community is central to identifying the competent member.” (Lawless, 2008 p127)

Lawless’ argument suggests that managers are unlikely to introduce changes to their practice if they doubt being perceived as competent within their workplace. This is consistent with Marsick’s (1990) concern that learners might experience a conflict between their new meaning perspective and the body of socially constructed meanings in the workplace. It also aligns with Reynold’s (1997) concerns about managers committing cultural suicide, Czarniawska’s (2003) idea that legitimacy is only given to those espousing fashionable theories and Fenwick’s (2005) view that enlightened managers might be unable to sustain changes because they would be regarded as weird. Each of these arguments is based on concerns for management practitioners whose visible behaviours are different to the *norms of behaviour* for people in these roles within a particular *organisational culture*. More specifically, there is a concern that behaviour which is visibly different to ‘the way things are done around here’ may be regarded by others members of the organisation as bad, wrong or inappropriate.

In the light of these concerns, the findings for Hugh are remarkable. Here we have a senior internal consultant, employed by a large organisation, into which he described

introducing a structured change management methodology originating from Harvard, and who then returned from a UK-based Masters programme to begin working in a completely different way. Furthermore, Hugh talked in positive terms about how he was feeling about his new practice, the results he was achieving and the reactions of both his colleagues and his line manager. This is not to say that Hugh reported no adverse reactions, because he did, but he portrayed himself as quietly persisting and winning people over. Why was Hugh not constrained by the *norms of behaviour* within his organisation? It is possible that he was already so senior and so highly regarded that he felt no need to demonstrate his competence within the bounds of what was regarded as normal behaviour. It is possible that he was already perceived as an innovator, having introduced new methods before, and this may have meant that his colleagues were receptive to his new ways of doing things. Hugh's account contrasts sharply with Kim's, who described adopting new practices similar to Hugh, but having to move to another organisation in order to do so. Hugh described feeling valued for his work, even more so after his learning, while at the same point in time Kim talked about not feeling valued or understood. Kim outlined her awareness of discourses circulating within her organisation which influenced the value placed on certain activities and not on others. Within this context Kim claimed that her contribution was denied value in public but acknowledged in private:

“I can't live in a vacuum where I'm working very hard, very hard to do the right thing and get kicked back in public all the time, people complain about it all the time, and then actually go and do what I suggested in the first place.” (Kim, 2005)

One cannot help noticing the gender difference in the accounts given by Hugh and Kim. Fletcher (2004) has argued that men and women experience differential

responses when engaging in similar behaviour, so it is possible that these findings provide a further illustration of this. However, without further knowledge of the contexts in which Hugh and Kim were working it is difficult to draw any definitive conclusion about whether gender was the key factor in their differential experiences.

Like Hugh, Chris persisted with changes in his practice within the same organisation, but in 2007 he talked about feeling isolated, exhausted and misunderstood. In his account Chris talked about a recent promotion being a contributory factor in his new willingness to challenge conventions within his organisation. It is possible that Chris, like Hugh, had reached a level of seniority which he felt exempted him from the local *norms of behaviour*. However, unlike Hugh, Chris talked mainly in terms of thinking more divergently and challenging prescribed ways of doing things, but he did not describe his practice as being informed by any new assumptions about the world, organisations or people or being based upon any new theories, models or modes of behaviour. So the nature of the changes in practice described by Hugh, are qualitatively different to those portrayed by Chris. Hugh depicted himself as having new foundations (assumptions) on which to base his new behaviours and thought processes, while Chris portrayed himself as challenging existing doctrine and prescription. These two different orientations might be characterised as “let’s do it like this” in the case of Hugh compared with “let’s not do it like that” in the case of Chris. Thus Hugh appears to have offered a hopeful alternative whereas Chris was possibly challenging his colleagues to begin finding alternatives. The former is constructive and reassuring while the latter is potentially demanding and anxiety provoking. Furthermore, Hugh’s account conveys his sense of being a valued member of his community while Chris’ story about his appraisal in 2007 suggested that his

efforts were neither understood nor valued by his superiors. Taken together, this interpretation of the findings suggests that critical postgraduate management education needs to provide more than a critique of traditional thinking and practice if it is to enable learners to develop and sustain changes in their behaviour.

### **7.3.3.2 *Constraining***

Whilst Hugh and Chris described being able to sustain changes in their practice within their current working environment, several other research subjects described feeling constrained by the reactions of their colleagues or by their own thoughts on how they were perceived. Of the four female research subjects featured earlier, two moved into new working environments in order to apply their learning. Amy and Kim were explicit about feeling they *needed* to move in order to practice in a new way, with Kim moving to a completely new employer and Amy into a brand new role in a different part of her organisation. Gill and Fiona were less explicit about whether they *needed* to move or whether their consulting work simply resulted in them migrating to new assignments. In 2005 Fiona described experimenting with new practices within her existing client organisation but in 2007 she talked about working for a new client and contrasted her behaviours and overall approach with how she felt required to practice with her previous long-term client. Gill portrayed herself as working with a series of clients so each one provided her with a new context in which to operate. Once in their new environments, all four of these research subjects described themselves as being much more engaged in their work and behaving in ways broadly consistent with the *process-relational perspective* (Watson, 2002) as discussed earlier.

These findings are similar to those published by Raelin and Coghlan (2006) in which one female research subject reported feeling more immersed in her work, no longer

seeing other people as ‘the problem’ and re-framing her thinking and language. There are also similarities with Rigg and Trehan’s (2004) findings which included a female manager who adopted an alternative non-masculine role model which allowed her to value sharing, honesty and listening, to feel more confident and to trust her instincts. There are parallels with Gill and Kim who both spoke a great deal about placing a higher value on their instincts and intuition, as discussed in section 7.4. So, from a community of practice perspective (Lawless, 2008) it would seem that Amy and Kim chose to move into completely new contexts in order to be seen as competent, rather than being seen as incompetent within their previous working environment. Kim gave a detailed account of how she felt undervalued in her original role and how her preferred mode of practice was contrary to the norms of behaviour. In 2005 she summed this up as:

“So am I different, yes. It is an issue, yes, it absolutely is an issue.” (Kim, 2005)

Then in 2007 Kim talked in much more joyful terms about working in a new role in a new organisation and feeling able to transfer her learning into that workplace, making a direct connection between her change of employer and the freedom to apply her learning:

“I had to change companies to be able to practice in a different way” (Kim, 2007)

Amy also described feeling undervalued in a role which she had been doing for around 18 months. She talked about the Chief Executive’s perception of her changing from being a “rising star” to an “average performer” as a result of the difficulties she was experiencing in this role. However, Amy did not interpret this as a reflection on her abilities, but as a consequence of a mismatch between her skills and those which were recognised and valued in that part of the organisation:

“...all of Dave’s skills, who is the boss, were recognised in that environment and organisation, and all of my skills were seen as that's just pink and fluffy nonsense...” (Amy, 2005)

Amy recalled negotiating with her line manager in order to secure a move to a completely new role elsewhere in the organisation, early in 2005:

“...a conversation that Dave and I had about my despair about this job and how I needed to leave and him not wanting to let me go because I think he realised that my skills complemented his skills and he couldn’t see that my skills weren’t valued organisationally.” (Amy, 2005)

Reflecting back on this career move and her learning journey, Amy talked explicitly in 2007 about how she had tried really hard to fit in with the organisational culture:

“I think it was my feelings of ‘non-fit’ ... if that is a word... and my struggle with trying to change my behaviour to ‘fit’ the organization, to ‘fit’ my line manager, or to ‘fit’ what I perceived was needed to be a success in the organization, and that inevitably caused huge amounts of angst and feelings of failure...” (Amy, 2007)

She contrasted her old sense of ‘non-fit’ and the way this made her feel with how she felt about her new role in 2007. Asked whether she now felt a sense of ‘fit’ Amy said:

“I do and it’s such an incredible feeling because you don’t realize how much energy is used up in trying around this kind of...sense of... ‘it’s not working, I feel a failure’, it takes up an inordinate amount of your time and energy in thinking. And when you do feel like you fit, you’re free then to do things with and for other people and you’re kind of able to give that energy out to sort of seeing what’s happening around you and seeing how you can influence things.” (Amy, 2007)

Taken together these findings illustrate how Amy transferred into a new role and working environment in order to apply her learning, play to her strengths and thereby feel competent and valued.

In addition to Amy and Kim, some of the other research subjects who experimented with changes in their practice, also described feeling constrained either by virtue of feedback from their colleagues or by their own sensitivity to how they believed they were perceived. One of the clearest illustrations of this came from Ian who described receiving the following negative response from his line manager as a result of experimenting with an emergent, organic conversation based approach to strategy development:

“...my boss came to me – he wasn’t in the meeting – and said I’ve got some feedback for you from the meeting. I said, okay. He said you have to stop using the word ‘conversation’ and I laughed, and he said no, I’m not joking. I said okay, why? He said people are just assuming you’re going round talking to people and nothing is happening. I said does anything happen without having conversations? He said, yes, I know about that, but this is what I’m telling you.”

(Ian, 2005)

In this illustration Ian is told to stop referring to *conversations* because his peers are associating this activity with not getting anything done which can be described as ‘not doing real work’. Ian’s visible behaviour and the language he is using to describe this behaviour, appear to be contravening the local *norms of behaviour*. What is particularly interesting is that Ian’s boss asks him to “stop using the word conversation” whereas he does not ask him to stop using a conversation based approach in his work. We might deduce from this that Ian’s boss was supportive of his new approach but did not want it highlighted or named, particularly using

terminology which colleagues would not recognise as ‘work’. It is illuminating to analyse this encounter using the concepts of *public-sphere* and *private-sphere* (Miller, 1986) reviewed towards the end of Chapter 4. Miller (1986) argued that male society, and hence the majority of work, has been structured in a manner which recognises male skills and modes of being within the *public sphere* which is characterised by separation, individuation and independence. Meanwhile women have been required to attend to the relational aspects of life most often associated with developing and encouraging others, in the *private sphere* characterised by connection and interdependence. Skills associated with the private sphere, such as fostering relationships are seen as ‘naturally occurring’ whereas public-sphere skills are perceived to be the result of education. Hence:

“...Most so-called women’s work is not recognized as real activity.” (Miller, 1986 p53)

Therefore within Ian’s working environment, the word ‘conversation’ as a descriptor of a relational mode of practice might not only contravene local norms of behaviour, it might also be regarded as ‘not real work’ because it is perceived as so-called women’s work. However, this might simply be two different ways of saying the same thing. If the local norms of behaviour have been defined in terms which are aligned with skills and behaviours culturally associated with masculinity, then any skills and behaviours culturally associated with femininity will necessarily be regarded as ‘not real work’. The feedback and difficulties which Ian associated with his transfer of learning into the workplace resulted in him struggling to maintain his sense of authenticity and coherence. By 2007 he had left the organisation to become self-employed.

In a similar vein Edward alluded to a gendered tension between his colleagues' preferences, during a staff away-day, for "gung-ho" action instead of engaging in reflective learning. Edward's perception was that his colleagues regarded the latter as rather "pink and fluffy", a term directly associated with femininity. Based on Edward's account it is not possible to know whether he felt constrained by these perceptions and changed or moderated his approach accordingly, but he was clearly aware of at least one way in which he was challenging local norms of behaviour. A final illustration, this time from James, highlights an instrumental tension between his colleagues' preferences for decisive action and his own emerging preference for thoughtful debate. James described being in senior management meetings in which his colleagues became frustrated with him because he wanted to generate more ideas, ask questions, prolong the debate and keep options open. This appeared to conflict with a focus on decision making which James perceived to be their priority:

"...I can see that they get frustrated because I think I begin to raise the insecurity in the group by doing this, because this is not – in their minds – what we're here to do, we're here to make decisions." (James, 2007)

It is not clear whether James' perception of his colleagues' priorities caused him to moderate his challenge to their conventional ways of behaving in these meetings. However, as in the case of Edward, James was clearly aware that he was pushing at the boundaries of the local norms of behaviour.

### **7.3.3.3 *Transfer tactics***

The focus so far has been on the reactions from colleagues described by the research subjects as they transferred their learning into the workplace. However, very little has been said about the *tactics* employed by the research subjects and the relationship, if any, between these tactics as the reactions attributed to colleagues. In this context the

word *tactics* is used to describe several characteristics of the ways in which the research subjects introduced changes in their practices. These characteristics include the pace of change, the degree of change, and the extent to which they drew attention to the change. Interpretation of the findings presented in Section 6.3 suggests that there is a very clear relationship between *tactics* and *reactions* such that colleagues reacted negatively to sudden changes or the generation of uncertainty, while a more subtle ‘sowing seeds’ approach appeared to have caused fewer adverse reactions.

Hugh was the only research subject who described being able to sustain significant changes in his working practices within his current role and organisation, and with few adverse reactions from his colleagues. Throughout his interviews Hugh described taking care not to rubbish the old ways of doing things. He portrayed his tactics as subtle and respectful, avoiding direct challenges to existing practices and avoiding drawing attention to his new thinking and methods:

“...you know, we’re trying to massage this into the organization, rather than hit it with a hammer...” (Hugh, 2007)

As Hugh talked about helping others to understand the complexity approach to change he gave a beautiful description of his subtle approach:

“...I need to feed them carefully so that I plant a seed rather than dig up their garden.” (Hugh, 2007)

Hugh’s account stands in stark contrast to those provided by Amy, Chris, Gill and Ian featured in Section 6.3.3.5, in which they associated negative reactions with the introduction of direct and visible changes. For example, Amy implemented immediate changes to the way she ran her team meetings but she said this confused her team. Chris spoke about making direct and therefore noticeable challenges to

conventional ways of doing things, and he associated these events with resistance, confusion and misunderstanding. Ian said his team began taking annual leave on his first day back from each module, allegedly because his sudden experimentation with the latest new ideas made them anxious. Gill said she offered a complexity approach in a proposal to a new client but she claimed they were too nervous and risk averse to proceed. Later in 2007, both Ian and Gill spoke about realising they needed to be a bit more subtle rather than being so explicit about their challenges to convention.

These illustrations show that sudden, direct and visible challenges to local *norms of behaviour* were associated with adverse reactions among colleagues. Conversely, a gradual, subtle and less-visible approach was associated with mainly positive reactions and the ability to ‘bring colleagues along’ with the change. An initial observation is that these findings seem obvious. People can be sceptical about new ideas, especially ones which they don’t understand and any form of sudden change can be disturbing. However, if it is obvious that a gradual, subtle and less-visible approach is required in order to transfer learning without upsetting colleagues, then why did so many of the research subjects not adopt these tactics? It is illuminating to refer back to Vince’s (1996) cycles of emotions once again and notice that those research subjects who introduced change, were in effect imposing a learning experience on their colleagues and thereby generating anxiety, the starting point for a learning cycle. Hugh appeared able to support his colleagues through the anxiety, uncertainty and risk of ‘doing and learning something new’ as illustrated in the story about the senior management all-day workshop which he ran without an agenda. Hugh talked about the new insights which this generated for at least one of the workshop participants, which suggests that this individual completed the cycle of

emotions promoting learning. It is possible that some of the other research subjects noticed this initial anxiety in their colleagues but were less able, for whatever reason, to work with this in a constructive way, resulting in flight, avoidance and resistance from their colleagues.

It is also informative to notice that Hugh was necessarily restrained in his challenge to the 'old ways of doing things' because within his line of work this meant challenging the change management methodology which he himself had introduced. It is therefore not surprising that Hugh was gentle and subtle in the way he approached the introduction of a new approach to change because he had invested so much of himself and his reputation in the old methodology. If organisations are understood as complex social processes involving the people who do work in the name of the organisation, then it becomes clear that any denigration of the local *norms of behaviour* can be interpreted as a criticism of the people who comprise the organisation. Due to his unique circumstances Hugh possibly noticed this and responded accordingly, as he put it, by 'planting seeds' rather than digging up everyone's garden. Some of the other research subjects perhaps felt less ownership of the practices which they were challenging, and as a result experimented with changes with insufficient regard for how their colleagues might interpret these as personal criticisms.

## **8 DISCUSSION OF IMPLICATIONS**

This chapter features a discussion of the implications of the empirical research findings for the theory and practice of management and management education. The first section flows from the research questions relating to emotions and concludes that critical postgraduate management education can be a site for conscientization and transformative learning and that the outcomes for participants can be positive.

However, it is argued that the realisation of these positive outcomes is dependent on several factors including the capability of the educators, the support provided to the learners during the learning process, and the extent to which the learners receive guidance on how to handle transfer of learning into the workplace. This highlights the need for personal development for many academics seeking to deliver critical postgraduate management education. The importance of this is argued on the basis that the skills and practices of the educators in the learning environment have a direct impact on the success of subsequent transfer of learning, because the educators effectively provide a role model for initiating and supporting learning and change within individuals and groups. In the first section it is also argued that this thesis makes a contribution to the delivery of ethical postgraduate management education because both educators and participants can be more fully informed about what they are undertaking.

The second section looks at how the findings from this research confirm, challenge, revise or add to the discourse calling for changes to management education. This begins by contrasting the limitations and anxieties of working from a systems-control orientation, with an apparent benefit of adopting practices broadly aligned with relational practice. In the third section it is argued that the critical management

education discourse is too focused on critique and that instead it needs to embody the teaching of a hopeful alternative such as Watson's (2002) process-relational perspective or Fletcher's (1999) relational practice. However, it is argued that the outcomes of critical management learning are not necessarily gender neutral, effectively adding another string to the 'critical bow'. This leads to a discussion of the significance of *human individuality* as the ontological component of the social world which underpins the gap between research, teaching and practice. As a result, a number of new dimensions are proposed for the theory and practice of critical pedagogy in order to surface the logic of effectiveness and theory of adult development embedded within the educational method and content. Please note that many statements within this chapter have not been referenced because they summarise arguments which have already been developed and referenced earlier in this thesis.

## **8.1 Towards transformation - emotional journeys**

Consistent with the aims of a phenomenographic research methodology, findings from this study portray a wide variation in the emotions and patterns of emotions which the research subjects described experiencing during their learning process. These range from the intense highs and lows described by Amy, Hugh and Ian, the disturbing pain and confusion depicted by Dave, the resistance outlined by Lucy, the discomfort, vulnerability and appreciation reported by Gill, Fiona and Kim as well as the mild concerns and enjoyment talked about by Ben, Chris, Edward and James.

The findings also illustrate how much the subjects valued receiving skilled empathetic support from faculty as they wrestled with the intellectual and emotional turmoil precipitated by a critical action-based experiential learning. Hugh, Gill, Fiona and Kim all made direct references to this while Dave alluded to a lack of support which possibly contributed to his resultant state of distress and confusion. The findings also

provide numerous illustrations of individuals attributing a wide variety of changes in their thinking and practice to their learning experience. They therefore provide a basis for arguing that critical postgraduate management education can be a site for conscientization and transformative learning and that the outcomes for participants can be positive. However, it is also argued that the realisation of these positive outcomes is dependent on several factors including the capability of the educators, the support provided to the learners during the learning process, and the extent to which the learners receive guidance on how to handle transfer of learning into the workplace.

### **8.1.1 Equipping educators**

Numerous scholars have called for management education programmes to embody critical perspectives and action-based experiential learning. There are examples of innovation and creativity within this discourse as well as several accounts of attempts to operationalise such pedagogies within teaching practice. Critical pedagogies within management education involve challenging each learner's previously held knowledge, beliefs and assumptions hence some attention has been paid to the emotions likely to be experienced by the learners during such an unsettling experience and the consequences for them back at work. However, whilst their theoretical concerns embrace the 'manager as learner' point of view, the majority of published research studies within this area focus on the practical and emotional difficulties experienced by the educators themselves. This self-obsessed orientation betrays a lack of maturity, like parents who feel uncomfortable talking to their children about the realities of adult life and who therefore avoid such conversations. Hence the narrative promoted via this discourse is one of good intentions but avoidance "This is all very troubling, and anyway, perhaps it's best not to frighten the children". This orientation discourages learning among management educators.

A much more mature debate is needed, one in which management educators acknowledge their own need for education and development. Here the focus would be on educators accepting that critical postgraduate management education will necessarily be unsettling for both learners and educators and that educators need to understand such learning cycles, develop skills to support the learners, and thereby make progress with their transformative agenda. For example, educators need to be well informed about the emotions likely to be experienced by themselves and by programme participants, as well as being sufficiently skilled to provide support to individual learners as they deal with the anxiety and uncertainty generated by critical and transformative learning. An understanding of the emotions associated with various learning cycles (Vince, 1996) would be a good foundation on which to build further knowledge and skilled responses which promote learning. However, this is just one element within a much broader set of learning outcomes for educators who need to be able to handle their own emotions whilst simultaneously providing empathetic support to programme participants. This raises questions about the extent to which management educators are sufficiently informed and skilled to do this. Several of the faculty at the selected research sites clearly have the required knowledge and skills but are they representative of their peers?

Academic career paths are dominated by the acquisition of knowledge, the development of research skills and success in peer-reviewed publications. Doctoral students are now prevented or discouraged from teaching while working towards their PhD. Newly appointed academic staff at some universities are now required or encouraged to undertake a Postgraduate Certificate in Learning and Teaching in

Higher Education (PgCLTHE) accredited by the Higher Education Academy (<http://www.heacademy.ac.uk/home>). However, this programme does not address the complex and unsettling emotional journeys experienced by some adult learners participating in critical postgraduate education, journeys of the type illustrated in this thesis. Furthermore, established academics are often not required to participate in such programmes. Consequently, academics are only skilled in supporting critical management learners if they have developed the relevant understanding and practices either through life experiences or other educational or developmental activities which they have personally chosen to pursue. Therefore, with the exception of those who have a personal or professional interest in adult education, it is reasonable to conclude that academics are largely unprepared for the emotional aspects of critical postgraduate management education. Ironically, just as the emotional aspects of managerial work and action learning are typically banished from the literature, so they appear to have also been banished from personal and career development routes for management educators. It seems odd that numerous departments of education in UK Universities undertake research into the most effective ways to teach subjects such as maths, science and medicine, yet aside from rare exceptions such as the Department of Management Learning and Leadership at Lancaster, research into the educational processes used within University-based business and management schools is mostly absent. This suggests that further work is also required to foreground *management learning* not only as a research discipline but also as an essential source of valuable guidance and development for all management educators.

### **8.1.2 Equipping learners**

These research findings also generate questions around the extent to which learners are sufficiently informed and skilled to handle the emotions associated with transfer of

learning into the workplace. The interpretation of findings presented in section 7.3.3.3 on *Transfer tactics*, suggests that when learners introduce new practices into the workplace then this initiates a cycle of experiential learning among colleagues, who experience emotions which are strikingly similar to the *promotion of learning cycle* or the *discouragement of learning cycle*. Hence the person doing the transfer of learning needs to be skilled in handling these situations in the same way that educators need to be skilled when they are running the original learning process. For example, when a learner transfers their learning into the workplace, this can cause colleagues to question their existing knowledge, beliefs and practices, generating anxiety for these colleagues and hence the starting point for a learning cycle. If the learner recognises and understands what is happening to their colleagues and can support them through the learning process, then the initial anxiety will become constructive, learning will be promoted and the colleagues will gain new insights. This is illustrated by Hugh's story about a senior management all-day workshop which he ran without an agenda. This requires the original learner to temporarily shift into the role of empathetic adult educator, mirroring the support they themselves received during the original programme – if they were fortunate enough to engage with skilled faculty! However, if the learner generates anxiety among colleagues but does not understand what is happening or how to support the process, then the findings suggest that this anxiety will cause the learner to retreat from the transfer of learning, with colleagues following a cycle of emotions which discourages learning. This is illustrated by Ian who described generating anxiety among colleagues to the extent that they began taking annual leave when he returned to work after each learning event.

Hence the skills and practices of the educators in the learning environment have a direct impact on the success of subsequent transfer of learning, because the educators effectively provide a role model for initiating and supporting learning and change within individuals and groups. The paucity of research into transfer of learning within the context of critical postgraduate management education in the UK, suggests either a lack of interest or little understanding of the influential role which educators play within this process.

### **8.1.3 Tales from the female side**

One common thread within the findings from this research is that the majority of subjects associated mainly positive emotions, or a reduction in negative emotions, with their transfer of learning into the workplace. There are some exceptions to this overall conclusion, which have been discussed in Chapter 7, but these do not detract from the positive accounts provided by the majority of research subjects, including those who talked about implementing significant changes in practice. These findings contrast sharply with Brookfield's (1994) research in which many subjects reportedly experienced a loss of innocence, loss of support from colleagues and severe limitations on career progression:

“Many adult educators complained that being critically reflective had only served to make them disliked by their colleagues, had harmed their careers, had lost them fledgling friends and professionally useful acquaintances, had threatened their livelihoods, and had turned them into institutional pariahs.” (Brookfield, 1994 p209)

However, there are numerous important differences between my research and Brookfield's (1994) study which merit further elaboration. The comparison set out in Figure 17, highlights the gender of Brookfield's research subjects (mostly female) and

the cultural context in which they were working (mainly long-standing traditional patriarchal organisations).

**Figure 17 Comparison of empirical research informing Brookfield (1994) and this thesis**

	<b>Brookfield (1994)</b>	<b>This thesis</b>
Research subjects	311 adult educators <u>mostly female</u> , working in church, army, and universities	5 female and 7 male experienced managers and management consultants working in private and public sector orgs.
Empirical research era	1981 to 1992	2003 to 2007 (Learning experiences commenced in 2003 with first interviews in 2005)
Empirical research duration	11 years	4 years
Cultural context	US	UK
Type of learning	Critical reflection	Critical postgraduate management education including critical action learning

Hence the difficulties reported by Brookfield's research subjects, particularly the notion of becoming an 'institutional pariah', could be interpreted as a conservative response from within a male-dominated organisation, in which the dominant group (men) have sought to protect their *organisational culture* including *norms of*

*behaviour* from challenges by the non-dominant group (women). However, despite the gendered and culturally specific nature of Brookfield's research, it has repeatedly been used as a source of concerns for managers (mainly men) participating in critical postgraduate management education within the UK in the late 20<sup>th</sup> and early 21<sup>st</sup> century. What's more, references to Brookfield's (1994) research rarely refer to the gender of the majority of the research subjects, yet this is clearly a key factor in interpreting the findings. This suggests that it is time to invite management educators to pay attention to more recent and more relevant research, including Rigg and Trehan (2004), Trehan and Rigg (2007), Raelin and Coghlan (2006) and this thesis, each of which suggests a more varied and seemingly more optimistic spectrum of achievable learning outcomes.

#### **8.1.4 Ethical education**

The responsibilities of management educators are central to the ethics of any form of management education which embodies a transformative intent. For example, is it ethical to invite people into a learning process which generates personal development which is potentially more profound and more troubling than the learners might have chosen had they known? What gives educators the right to do this to people? A few of the research subjects talked about their learning journey taking them to a new place but simultaneously wondering whether it was necessarily a better place. Should educators offer programmes which give people what they want or what is right for them and who gets to define what is right? These are profound ethical questions which have two distinct elements. Full disclosure is said to be a fundamental requirement of any educational process, hence in order to ensure that learners are not 'done to' by emancipatory educators, there is a need to ensure that learners are fully informed about the nature of the learning experience they are entering. Both of the

selected research sites were explicit about their transformative intent, as discussed in Chapter 3, yet the research findings included examples of participants who appeared unwilling to engage in some of the reflective learning processes. Were these research subjects fully informed about what their programme would involve and how unsettling it might be? If potential programme participants are fully informed, does this risk alienating those who are nervous of volunteering to be ‘changed’ through a process of introspection and emotional turmoil? These questions highlight the importance of publishing research findings such as those from this thesis, because these can inform managers about similar learning journeys, including what they might feel like and where they might lead. Hence this thesis makes a contribution to the delivery of *ethical* critical postgraduate management education, because both educators and participants can be more fully informed about what they are undertaking.

The second set of ethical issues brings us back to the problem of determining *what is right* and who gets to define what is *right*, in terms of the nature and outcomes of management education. These issues were rehearsed in Chapter 4, which reviewed the arguments through which management education is accused of producing the *wrong type of manager*. This is a highly complex and contested area because what counts as appropriate education for managers depends on ideological, economic, social, political and cultural factors. The debate about the alleged failings of management education provided the original point of departure for this research, hence to some extent the quest all along has been towards improving management education. So, how do findings from this research confirm, challenge, revise or add to the discourse calling for changes to management education? Reflecting on this question as my research progressed, I discovered the writings of the theologian and

philosopher David Bakan, who over 40 years ago wrote “The Duality of Human Existence” (1966). It occurred to me that Bakan’s ideas provided further insight into the underlying issue which my research had been wrestling with all along. Therefore a brief review of these ideas introduces the next section, as a preparation for the arguments which follow.

## **8.2 Management and education – deconstructing the discourse**

### **8.2.1 The duality of human existence**

Bakan (1966) asserted that living beings have two strategies for coping with anxiety and uncertainty in life which he called *agency* and *communion*:

“I have adopted the terms “agency” and “communion” to characterize two fundamental modalities in the existence of living forms, agency for the existence of an organism as an individual, and communion for the participation of the individual in some larger organism of which the individual is a part.” (Bakan, 1966 p14-15)

Where agency dominates the human psyche then the individual seeks to reduce anxiety by doing, controlling and achieving. Agency is an expression of isolation, independence, self-assertion and separation and involves the repression of feeling and impulse. Where communion dominates the human psyche then the individual seeks union and cooperation based on trust. Communion is expressed in being (as opposed to doing), contact, openness and forgiveness and a lack of repression of feeling and impulse. Bakan suggested gender differences between agency and communion but carefully explored such sexual differentiation at four ‘levels’, namely role in reproduction, secondary sex (physical) characteristics, role in society and

psychological makeup (Bakan, 1966 p107). Drawing on extensive writings and research studies in each of these areas Bakan finally concluded:

“If we think of agency and communion as two major functions associated with all living substance, then, although agency is greater in the male and communion in the female, agency and communion nonetheless characterize both.” (Bakan, 1966 p152)

Thus he argued that the notion of *wholeness* which we can equate with *maturity* is an integration of these two modalities within an individual. Bakan’s thesis at a societal level is that agency has been the dominant life strategy for several hundred years. He believed that this originated from Newton’s discourse on God as machine-maker (of the heavens) which invited man to *act* on a world which God had made. Furthermore, Protestantism and capitalism (Weber, 1958) combined to exaggerate agency and repress communion within the psychological characteristics of influential people (mainly men) and hence within society. During this period the dominance of agency has brought many benefits to the developed world, but Bakan believed that this approach had ceased to be appropriate:

“Our so-called affluent society is evidence of the success of the agentic strategy. ...*but*... “....the nature of the world has been so changed that this approach is rapidly becoming archaic. There is a rising sense of emptiness, meaninglessness, and absurdity.” (Bakan, 1966 p14)

The solution, according to Bakan is to mitigate agency with communion in order to achieve greater *integration* both within and between individuals. This echoes Biblical descriptions of individual wisdom which speak of the abandonment of autonomy, self-sufficiency and individualism (Langrish, 2008). At a societal level, Bakan believed that the Western world was on the brink of transition from ‘mid-life’ dominated by agency, into ‘maturity’ characterised by a balance between agency and communion.

Bakan's (1966) ideas are intriguing because they provide an alternative to debates between so-called male superiority and female advantage. Recall that some years ago Bennis argued that:

“...there is no difference between becoming an effective leader and becoming a fully integrated human being.” (Bennis, 1999 p23)

Hence Bakan has invited us into a new understanding of what it means to be a mature adult human, and hence an effective leader or manager, this being one in whom there is a balance between the agency and communion within their psyche and an ability to integrate these according to the situations they face.

### **8.2.2 The wrong trousers**

“...you have encouraged us to take off our suits of steel.” (Sinclair, 2007 p467)

The critical discourse in respect of management education embodies a number of well rehearsed debates about the alleged failings in management education. Some of these have their origins within the perceived flaws in the dominant discourse on managerial work, originated in Taylor's scientific management and more recently encapsulated in *systems-control thinking*. Fundamental concerns have been raised about the gap between systems-control thinking and research findings in fields as varied as psychology, sociology, organisation studies and management. Its rational models have been exposed as simplistic approximations which do not satisfy the criteria which would justify them being called scientific. Furthermore it has been described as a poor fit with contemporary needs as expressed by both scholars and employers calling for a new style of management which is participative, cooperative, softer, qualitative and people-oriented, attending to relationships and responsiveness to others, all of which is sometimes described as post-heroic leadership. Yet despite

these robust critiques, systems-control thinking continues to influence Western thinking about work generally and management specifically (Watson, 2003).

Agency pervades systems-control thinking as expressed in its preferences and aspirations for independence, mastery, separation and control. Extensive literature confirms that this discourse emphasises masculine skills, behaviours, interests and values, reinforced by many MBA programmes, which constitute the majority of management education. Hence largely developed by men for men, this discourse can be understood as a means of supporting a male preference for agency, aspiring to a sense of certainty within the workplace, maintaining a focus on science, objectivity and rational thinking, and screening out the emotional and relational aspect of life. In addition to the gendered advantages it confers on men, this discourse has enabled all managers to claim expertise, legitimate their authority, and derive a feeling of comfort and confidence in their authority and ability to control events. This is because it is rooted within the ideology still prevailing within contemporary Western society, particularly in the UK, which places a greater value on *control* rather than on *understanding* (Clegg, 2003). Control has been the central concept of all Western management systems for many years (Braverman, 1974). Therefore the dominant discourse remains stubbornly in place primarily because of its alignment with contemporary ideology and with male interests and values.

Czarniawska (2003) has skilfully argued that there are other reasons why this discourse remains popular, arguing that it enables managers to espouse fashionable theories and thereby secure rewards and, more importantly, to develop a sense of hope in their ability to achieve certainty and control. Yet scholars are aware that these

hopes are misplaced in that *systems-control thinking* encourages managers and their colleagues to develop unrealistic expectations about the extent to which work organisations, and changes to them, can be controlled. Control and certainty might be entirely suitable means and ends for activities such as supply chain logistics processes replenishing supermarket shelves, but in many other situations, such as widespread change within a large knowledge-based organisation, control is simply not feasible. If managers believe in a cause and effect relationship between their actions and the intended outcomes, then they overlook the “uncontrollable nature of social relations” and hence the variety of unforeseen responses and reactions which ensue (MacIntyre, 1981 in Grey & French 1996, p2). Hence:

“The experience of being the ones “in charge” but repeatedly finding that they are not “in control” is a very familiar one to managers – one that they feel uneasy about and seem unable to discuss openly with each other.” (Stacey *et al*, 2000, p4)

Not only do managers appear unable to discuss this situation with each other, Czarniawska (2003) has also given scholars a reason to avoid telling managers about the ‘real’ nature of organisational life, for fear that they become “sadder but wiser”. Furthermore if systems-control thinking provides *intellectual clothing* for managers, promising protection from the anxiety, uncertainty and troubles associated with managerial roles (Clegg, 2003) then which brave critical scholar would like to tell managers to remove their clothing and plunge naked into uncertain and complex working environments? Who would like to tell them that their *cloak of rationality* is illusory and that they cannot realistically avoid the complex, messy, ugly and unpredictable aspects of human behaviour and relationships simply by pretending that reason and objectivity rule within the realms of an employing organisation (Clegg,

2003; Czarniawska, 2003)? Thus a cycle of fear and avoidance is being established with these educators' publications.

However, fear usually originates from a lack of understanding hence the findings from this research offer the possibility of informing educators and reducing their fears. The findings show that when some managers are released from the mental models associated with systems-control style thinking, they report a reduction in anxiety and a greater sense of enjoyment, well-being and engagement in their workplace. This is illustrated in section 7.3 which featured six of the research subjects in this study, two men and four women, describing their migration away from rational models and control towards a discourse in which social interactions, primarily conversations and relationships, are the primary means by which organising takes place. These subjects appear to have understood the limitations of one way of thinking and successfully adopted another, broadly aligned with the process-relational perspective, which they portray as usefully informing their practice. Five of these six research subjects, four female and one male, associated these changes in their practice with a greater sense of well-being in their workplace, in section 7.2.1. This included feeling less anxious, more calm, relaxed, content, patient, enthusiastic, enthralled, and deriving greater satisfaction, pride and delight from their work.

Consistent with Watson's (2001b) thinking, we can conclude that managerial practice which is informed by thinking broadly aligned with the process-relational perspective, enables managers to be more engaged, relaxed and happier in their work. These outcomes are entirely predictable if one follows MacIntyre's (1981) reasoning and Czarniawska's (2003) argument that the prescriptive, predictive and controlling nature

of rational management techniques, are alluring but entirely fictional since they offer only an illusion of control because they deny the plurality of values, interests and goals among people who constitute an organization. Hence *systems-control thinking* can be a source of anxiety rather than protection for some managers because it promotes masculine *agentic* responses in situations where such responses are no longer realistic or suitable. Conversely, managerial practices based upon the *process-relational perspective* can be learned and the findings suggest that these practices give some managers a greater sense of well-being and engagement in their work and work-based relationships.

### **8.3 Towards the duality of managerial work**

The critical postgraduate management education discourse focuses on a critique of *what's wrong* with management and management education and pays much less attention to *what could be right*. For example, there is a focus on problematizing existing knowledge, values and beliefs and the casting of managers as the 'bad guys' complicit in worker exploitation. Where is the construction of new knowledge? Scholars talk about 'bringing the messiness of management practice into play' but how scary is that if you have just critiqued all of your earlier management models! The critical management discourse also emphasises *public sphere* concerns such as the historical origins of management, its political and social implications and the role of managers in making a better and more just society. However, it neatly excludes *private sphere* social concerns such as the growth and development of mature capable human beings, who are able to enter into mutually trusting and beneficial relationships. On those rare occasions when *private sphere* concerns about trust and relationships are included in the critical management learning debate then they are incorporated into the discourse on leadership development, and thereby

conceptualised as instrumentally useful for leaders, still mainly men. Hence the discourse reveals its masculine public sphere pre-occupations and a preference for critique rather than construction. Findings from this research make a contribution towards the latter thereby informing those management educators who acknowledge their contractual obligations to help managers improve the quality of their practices.

### **8.3.1 Naked fear and new clothing**

It has been argued that managers who recognise the limitations of systems-control thinking are released from a host of unachievable expectations and potentially this means that they are free to develop thoughts and actions consistent with the myriad of interdependencies which characterize social and organizational life (MacIntyre, 1981 in Roberts, 1996). However, it is unlikely that this freedom will feel comfortable for managers unless they are equipped with the knowledge, mental models and interpersonal skills which enable them to function optimistically as immersed and interdependent participants in a complex social enterprise. Within this research, Dave portrayed himself as “dismantled” in that he had critically reviewed his previous knowledge and beliefs but had yet to replace them with new and sure foundations. Therefore, critical postgraduate management education needs to embody not only a critique of orthodox thinking but also the teaching of a hopeful alternative.

Two hopeful alternatives are Fletcher’s (1999) relational practice and Watson’s (2002) process-relational perspective, both of which are informed by contemporary thinking in psychology and a post-structural perspective. Hence they hold out the promise of closing the gap between management teaching and practice, bemoaned by various scholars. Furthermore they are aligned with the new style of management which scholars and employers claim is required within the flexible, networked, information

rich organisations of the early 21<sup>st</sup> century. In addition, both of these perspectives require management practitioners to accept the complexity of organisational life rather than being content with the inaccurate simplification of reductionist orthodox thinking. The process-relational perspective (Watson, 2002), like relational practice (Fletcher, 1999), also seems to embody a feminine rather than masculine *logic of effectiveness* which means an emphasis on being a skilled interdependent participant within some larger social enterprise rather than a skilled self-contained individual. The parallels with Bakan's (1966) definition of *agency* and *communion* are striking and I cannot help noticing that I appear to be using different concepts which in effect are saying the same thing!

Systems-control thinking traps men within an incomplete version of their human potential because it denies the need to develop relational competence. Furthermore it requires women to clothe themselves within a masculine mindset and encourages them to deny the relational aspects of their human repertoire. This places women in a double-bind because research has shown that if they do not act male they will be regarded as ineffective and if they do act male they will be punished for not displaying femininity. Hence relational practice creates a 'learning and growth opportunity' for most men and an apparent gendered advantage for most women as it affirms skills, values and behaviours which are said to be dominant within more females than males. However, as discussed in Chapter 4, women who adopt relational practice in working environments where a masculine logic of effectiveness prevails, risk their behaviours being perceived as 'not doing work'. Do men face the same challenge or is their relational practice recognised and rewarded as post-heroic leadership?

Fletcher (2004) warns of the differential responses likely to be experienced by males and females if their new behaviours are coded 'feminine' and some of the findings from my research, in respect of Hugh, Amy and Kim appear to illustrate this. For example, in section 7.3 only one of the featured research subjects who adopted relational practices stayed in the same organisation (Hugh) while Ian left to become a freelance consultant and the other four (Amy, Gill, Fiona and Kim) all changed either to a new employer or a new division. We do not know whether Ian left because of his new mode of practice, or for other reasons. Also, we do not know whether the changes for Gill and Fiona were a consequence of their learning and subsequent changes in practice because they were regularly changing roles anyway. However, what we do know is that Amy and Kim both described how they felt compelled to change to a new environment in order to implement relational practices. Hugh on the other hand was able to stay put. It is not clear whether we can draw any definitive conclusions from this very small sample but it is possible that these three research subjects illustrate Fletcher's (2004) concerns about men and women experiencing differential responses when attempting to implement a relational (post-heroic) approach. Hugh spoke about continuing to be highly regarded whereas Kim explicitly described how she felt misunderstood, undervalued, did not fit and needed to move. Hence although critical postgraduate management education can be a site for conscientization and transformative learning, the outcomes for participants are not necessarily gender neutral. Females potentially face greater difficulty in being recognised as competent members of a work-place community, if their transfer of learning results in visible behaviours which are different to the local masculine norms. Based on Hugh's story it appears possible for a man who is deemed competent in terms of the masculine logic of effectiveness, to change his practice and subsequently

be regarded as competent in accordance with a feminine logic of effectiveness. Also, based on the stories from Amy, Fiona, Gill and Kim it appears possible for women to adopt relational practice and to be regarded as competent in some working environments. In conclusion, these findings effectively add another string to the ‘critical bow’ because they illustrate what appear to be the gender dependent consequences of critical management learning.

### **8.3.2 Research informed foundations**

Research intensive universities emphasise the value of their research-informed teaching which they claim is better and more valuable than other forms of teaching. If this argument informs practice, then it would be reasonable to expect university-based management education to be informed by research. So why does Czarniawska (2003) argue that there is a gap between *knowledge we have* and *knowledge we teach*, as discussed in Chapter 4, a gap which one would not expect to exist yet one which is allegedly wider than “in any other subject taught in universities” (Grey, 2003 p349)? Some scholars have challenged the extent to which this gap exists and in my head I can hear academic colleagues at Exeter, arguing that their teaching is most definitely informed by their research. Can my research provide any insights into this apparent problem?

Within the research findings, Ian used the word *epiphany* to explain the sudden and profound change in his understanding when he realised, for the first time that organisations and his work were all about people. Ian was one of five research subjects who described building their hopes upon this new foundation which revealed a shift in their understanding of the ontological status of human individuality from *fixed* to *relational*. This ontological shift is significant because it constructs a

different foundation on which to conceptualise and enact managerial work. A *fixed* understanding of human individuality constructs managerial work as a highly individual activity whereas a *relational* understanding conceives of it as a social activity which is fundamentally about interdependent people. Once again this has parallels with Bakan's (1966) *agency* and *communion* suggesting that the goal of management education is the development and integration of both individual and interdependent competencies within maturing individual managers.

What does this tell us about whether university-based management education is informed by research, and whether there really is a gap between 'knowledge we have' (derived from research) and 'knowledge we teach' (Czarniawska, 2003)? The answer depends on the nature of the research, specifically the extent to which it explores the very nature and essence of phenomena in the social world. A significant proportion of research undertaken in schools of business and management is focused on issues ranging from supply chain logistics, inventory control, service processes and innovation through to marketing, venture capital and financial reporting. Hence it is possible to argue that there is probably little or no gap between research into these subjects and their associated teaching. However, while these subjects are all important, they mainly comprise the technical, commercial, financial, security and accounting activities defined by Fayol (1916, 1949). Distinct from these, Fayol (1916, 1949) defined management activities as those required to mobilise and organise *people*, who undertake all of these other activities, hence the way this is accomplished impacts *all* activities within the organisation. Based on the earlier discussion it is clear that the way management activities are conceptualised and enacted depends upon the way human individuality is understood. Czarniawska (2003) was concerned

about the gap between teaching and our fundamental understanding of human behaviour. Hence drawing on Czarniawska's argument and findings from this research, it becomes possible to see that *human individuality* is one of the key ontological components of the social world which lies at the heart of concerns about the gap between so-called *knowledge we have* and *knowledge we teach*.

A few academics involved in the design and delivery of management education will have acquired a theoretical understanding of the nature of human individuality through their study and research, particularly if this has been in areas such as psychology, sociology or organisation studies. However, if their focus has been elsewhere then they will bring their default understanding of the nature of human individuality into the classroom. The majority of business school academics are male<sup>1</sup> therefore those who rely on their default understanding of people, are more likely to adopt what has been called a *masculine, agentic* or *orthodox* perspective which will result in them regarding individuals as self-contained entities, distinct from their social existence. Research has shown that this way of thinking is simplistic and inaccurate for the purposes of understanding human behaviour (Watson, 2002). Therefore, despite the discourse promoting changes in management education, there appears to be a lack of reflexivity on the part of some contributors to this discourse and among many of their academic colleagues within business schools. As a consequence, those who are guilty of this lack of reflexivity bring a meaning perspective into their teaching which is informed by a simplistic, inaccurate, out-dated and gender biased understanding of human individuality and hence human behaviour.

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<sup>1</sup> Females comprise 14% to 33% of faculty in Global MBA top 10 (FT rankings, January 2011)

### 8.3.3 Developing adults

Not only are the consequences of critical management learning potentially gender dependent, and educators potentially gender biased, critical pedagogy can be exposed to similar accusations because there is a lack of clarity about the embedded *logic of effectiveness* and hence the implied theory of adult development.

Chapter 2 included a review of Reynolds (1997) recommendations, based on Giroux (1981), for a critical pedagogy in which both content and the educational methodology embody a critical (radical) perspective. This was depicted diagrammatically in Figure 1 which represents four schools of educational theory and practice. Two of the schools include the teaching of *traditional content* which in the context of management learning, is understood to mean the dominant discourse on management. It has been demonstrated that this discourse embodies a masculine *logic of effectiveness* which values autonomy, individual achievement, independence and technical competence. The other two schools involve the teaching of *radical content*, and Reynolds (1997) defines what this means for critical pedagogy within management learning. However, what remains unclear within this definition is whether radical content embodies a masculine or a feminine *logic of effectiveness*, the latter valuing interdependence, enabling others, and growth, achievement and effectiveness occurring in the context of connection. Hence there is potentially a gender bias (masculine) within critical pedagogy which needs to be surfaced. This is depicted in Figure 18.

**Figure 18 Alternative pedagogies based on Giroux – extended for logic of effectiveness**

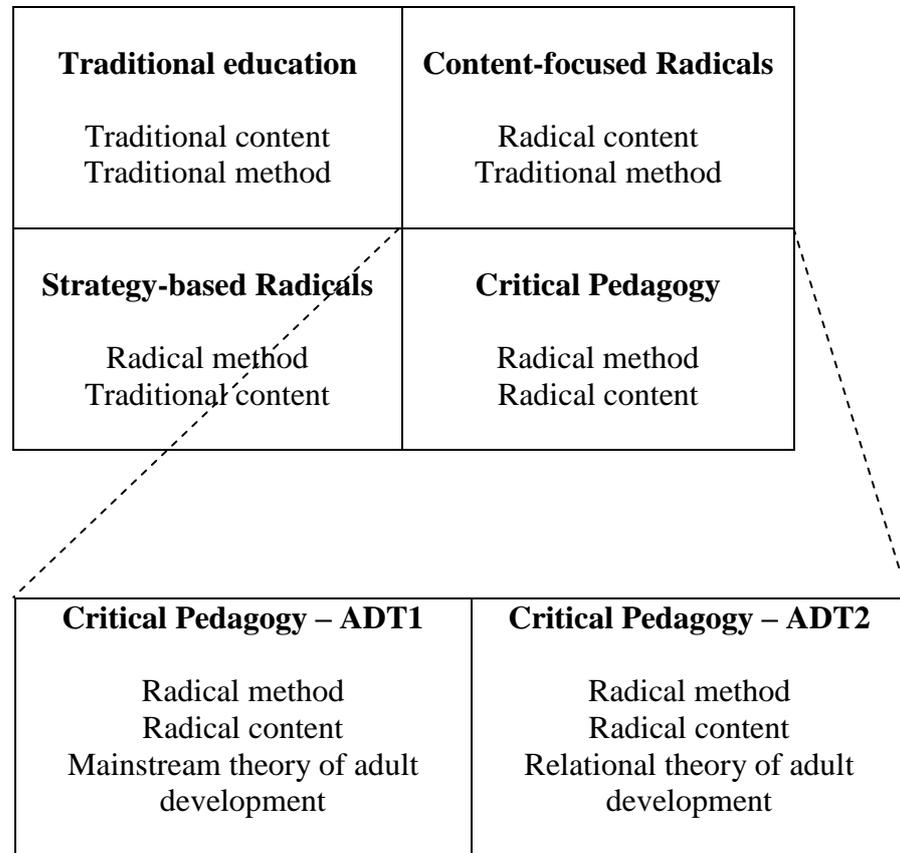
<p><b>Traditional education</b></p> <p>Traditional content Traditional method</p>	<p><b>Content-focused Radicals</b></p> <p>Radical content Traditional method</p>
<p><b>Strategy-based Radicals</b></p> <p>Radical method Traditional content</p>	<p><b>Critical Pedagogy</b></p> <p>Radical method Radical content</p>
<p><b>Critical Pedagogy (m)</b></p> <p>Radical method Radical content Masculine logic of effectiveness</p>	<p><b>Critical Pedagogy (f)</b></p> <p>Radical method Radical content Feminine logic of effectiveness</p>

At first sight it could be argued that educators are capable of including both the masculine and feminine logic of effectiveness within the radical content of their critical pedagogy, such that they are presented as alternatives for the learners to understand and critique. However, this overlooks the fact that these two alternatives are in effect a proxy for two different adult development theories (ADTs), which express alternative definitions of the nature of psychological growth in humans. Mainstream theories of adult development, based largely on men’s experiences, emphasise separation, independence and individuation as characteristics of becoming a mature and competent adult (Miller, 1986). We can also recognise this within Bakan’s (1966) description of agency. However, the more recent relational theory of adult development, called *growth-in-connection* emphasises connection,

interdependence, mutuality, emotional competence and empathy as characteristics of becoming a mature and competent adult (Fletcher, 1999). Similarly we can recognise this within Bakan's (1966) description of communion. The mainstream and relational theories each include characteristics of the other, but the important feature is the pre-eminence of separation in mainstream theory and the pre-eminence of connection in relational theory (Fletcher, 1999).

Hence the challenges to educators, and in particular those employing critical pedagogy, is for them to critically reflect on the theory of adult development (ADT) which is implicit within their educational method and content. Does 'traditional' imply a mainstream theory of adult development? Probably yes because this is consistent with its roots in orthodox psychology. Does 'radical' necessarily imply a relational theory of adult development? We do not know, because this is not explicit within the definition of critical pedagogy (Reynolds, 1997). Hence there is a need to surface the theory of adult development which is employed, deliberately or otherwise, within the educational method and content. This is depicted in Figure 19.

**Figure 19 Alternative pedagogies based on Giroux - extended for theories of adult development**



Taken together these arguments build a convincing case for management educators to be explicit about both their understanding of the nature of human individuality, and their theory of adult development which shapes their understanding of the nature of a mature competent adult. Without such critical reflection on their own meaning perspectives, and hence the assumptions which they bring into their teaching, there is a high probability that the dominant discourse on management will continue to be reproduced, through the delivery of management education.

## 9 CONCLUSION

The aim of this research was to *give voice* to a group of management practitioners who participated in postgraduate management education programmes embodying a transformative intent. Some of the research questions focused on the emotions and changes in conceptual frames of reference attributed to the learning experiences, while other questions focused on the emotions and changes in practice associated with transfer of learning into the workplace. Working from a post-structuralist perspective with qualitative data, the findings from this research do not constitute evidence based answers to the research questions. However, the findings are important and informative because they provide extensive, vivid and valid illustrations of the various ways in which twelve research subjects have portrayed their experience, over a two-year period, in relation to these questions. The overall aims of the research have therefore been met and what's more, a large and valuable body of data has been generated from which new insights have emerged.

### 9.1 Contribution to theory, policy and practice

With reference to the key theoretical and research debates within my sphere of interest, these findings make a number of contributions which illustrate, revise and enhance existing theory, policy and practice. These are outlined below together with recommendations for further research.

#### 9.1.1 Learner perspective

This research is the first study within the sphere of interest to generate data in respect of twelve research subjects over a two-year period. Earlier studies have reported on the experiences of only a handful of learners over much shorter timeframes. This

large and valuable body of data features the learners' perspectives, unlike most other studies in this area which focus on the educators' concerns. This study is also one of only a handful to focus on the emotions attributed by participants to their learning experiences, and it is possibly the only study to focus on both the practical and emotional aspects of subsequent transfer of learning. Hence this research makes a contribution to the delivery of ethical management education because it informs both educators and potential participants about the learning journeys they may consider undertaking. As the first published study of its type, this thesis highlights the need for further research into transformative management learning journeys, focusing on the learner's point of view in order to inform both educators and potential programme participants.

The study has also highlighted the gender bias within earlier studies in this area. Brookfield's (1994) influential study of adult education was based mainly on female research subjects and recent studies focusing on the workplace implications of critical management learning have also mainly reported on the experiences of women. For example Rigg and Trehan (2004) featured three subjects, two of whom were female, while Raelin and Coghlan (2006) provided an account in respect of one female. This is ironic in a field dominated by male practitioners and male educators, and a body of literature which typically fails to mention these facts! Further research into transformative management learning needs involve a balance of both male and female research subjects and dare I say this, we actually appear to need much more research into men's experiences!

### 9.1.2 Learner support

The findings have provided a basis for concluding that critical postgraduate management education can be a site for conscientization and transformative learning. However, based on the variations in learning experiences and outcomes portrayed within these findings, the outcomes realised by each research subject appear to be heavily dependent upon the capability of educators to provide skilled support to each learner during the learning process. Without such skilled support, there is a risk that learners will either resist engaging with the more difficult and troubling aspects of the learning process, or they will engage but prematurely exit the cycle in a state of confusion and distress. Existing academic career paths do not automatically include the type of learning and development which would enable business school academics to understand and skilfully support the emotional aspects of experiential learning cycles involving adult learners. This raises concerns about the capability of management educators to implement the transformative pedagogic reforms which many of them call for in their publications. However, this conclusion has been reached via a number of deductions hence further research is required to determine whether this academic skills gap actually exists and if so, what action might be taken to address it. Related to this, further work is also required to foreground *management learning* not only as a research discipline but also as an essential source of valuable guidance and development for all management educators.

This study has also led to the conclusion that the skilled support for participants during the learning process has a direct impact on the success of the subsequent transfer of learning. This is because the educators' behaviours during the learning process potentially provide a role model for the learners as they transfer their learning

thereby initiating and supporting learning and change back in their workplace. If the learner has benefited from the skilled support of an empathetic adult educator, then transfer of learning appears to be more successful. There is a lack of research into transfer of learning within the context of critical postgraduate management education in the UK suggesting further work is required in this important area. This might take the form of developing greater understanding of the connections between the role of adult educators, within the learning environment (classroom or other) and the role of the learners as they experiment with the application of their learning in their workplaces. More specifically it would be informative to understand whether transfer of learning can be improved by learners being explicitly aware and deliberately equipped to temporarily shift into the role of empathetic adult educator when returning to work.

### **9.1.3 Getting beyond fear**

A small number of scholars have expressed optimism about the beneficial outcomes managers will experience as a result of participating in critical, and potentially transformative, management learning (Dehler, 2001; Raelin and Coghlan, 2006; Rigg and Trehan, 2004; Trehan and Rigg, 2007; Watson, 2001). However, there has also been a chorus of conjecture about potential negative personal consequences which managers might face (Brookfield, 2000; Burgoyne and Reynolds, 1997; Czarniawska, 2003; Fenwick, 2005; Lawless, 2008; Marsick, 1990; Reynolds, 1997, 1999; Willmott, 1994) partly fuelled by Brookfield (1994). However, contrary to the bleak outcomes feared by these scholars, findings from this research have provided a basis for concluding that critical management learning *can* be transformative and that the outcomes for participants *can* be positive. The findings show that when some managers are released from the mental models associated with the dominant

managerial discourse, encapsulated in systems-control thinking (Watson, 2002), then instead of becoming “sadder but wiser” (Czarniawska, 2003) they report a reduction in anxiety and a greater sense of enjoyment, well-being and engagement in their work. The crucial factor in achieving these positive outcomes appears to result from their practice being informed by new frames of reference which they perceive to be useful guides to action. This highlights the need for the critical postgraduate management education discourse to embody not only a critique of orthodox thinking and the raising of consciousness about the political, moral and social aspects of managerial work, but also the development and teaching of a research-informed alternative mode of practice. Such alternatives already exist in Watson’s (2002) process-relational perspective and Fletcher’s (1999) relational practice, both of which offer the possibility of closing the gap between teaching and practice. Furthermore, they are aligned with the new style of management which scholars and employers have called for to meet the needs of 21<sup>st</sup> century information-rich organisations (e.g. Alvesson, 1998; Hendry, 2006; Kanter, 1989; Lee, 1994; Wajcman, 1998; Wheatley, 1999). .

However the findings have also illustrated Fletcher’s (1999) concerns such that the outcomes of critical management learning are not necessarily gender neutral. Females potentially face greater difficulty in being recognised as competent members of a work-place community, if their transfer of learning results in visible behaviours which are different to the masculine *logic of effectiveness* underpinning the local *norms of behaviour*. Recent research in the UK has confirmed a *gender bias* in many competency frameworks which are based on American research involving male senior managers and also a *contradiction* in that managerial behaviours said to be required (soft skills) are not those which are rewarded (Burgoyne *et al*, 2004). Further

research, involving both male and female subjects, is required in order to understand the challenges individual face when they behave according to a *logic of effectiveness* which is different to the local norm. In addition the findings have also surfaced a possible gender bias within current definitions of critical pedagogy (e.g. Reynolds, 1997) because there is a lack of clarity in respect of the embedded *logic of effectiveness* and hence the embedded *theory of adult development*. This brings us to the core issue, which is the need for educators, and hence managers, to be explicit about their understanding of the nature of human individuality which is intimately related to their theory about the way humans develop to become mature adults.

#### **9.1.4 Paradigm shift**

Management is in need of theoretical reformulation. The paradigm underpinning the dominant discourse treats the individual as a self-contained entity yet this way of thinking has been shown to be simplistic and inaccurate for the purpose of understanding human behaviour (Watson, 2002). Hence a paradigm shift is required so that theories about management and theories for the practice of managing are informed by the latest research into the nature of human individuality, behaviour and development. This means they need to be informed by a *relational* understanding of human individuality, behaviour and development. Such theories already exist (Fletcher, 1999; Stacey *et al* 2000; Watson, 2002) but these cannot yet be called mainstream or dominant. Furthermore, this research together with earlier work (Fletcher 1999, 2004; Marshall, 1984; Miller 1986; Spender, 1998) has highlighted the gendered nature of powerful barriers to change. What is needed is a way of envisaging the new paradigm which is accessible and informative both to educators and to employees of work organisations, including those who are paid to spend their time ‘managing’.

**Figure 20 Comparison of orthodox and relational paradigms**

<b>Theory / Concept</b>	<b>Framing the way we understand:</b>	<b>Orthodox paradigm</b>	<b>Relational paradigm</b>
Psychology (Watson, 2002)	Human individuality, identity and behaviour	<b>Orthodox psychology</b>  Agency located within individual who operates on external world; individuals motivated to fulfil wants and needs	<b>Relational psychology</b>  Agency located within relationships; individuals embedded within social situation and working on emergent identity
Psyche (Bakan, 1966)	Human responses to anxiety and uncertainty	<b>Agency</b>  Independence, separation, doing, controlling, achieving	<b>Communion</b>  Interdependence, co-operation, being, contact, feeling
Logic of effectiveness (Fletcher, 1999)	Valuable outcomes from human endeavour	<b>Masculine</b>  Independence, individual achievement, instrumental goals, autonomy	<b>Feminine</b>  Interdependence, collective achievement, mutuality/reciprocity, growth-in-connection
Theory of adult development (Miller, 1986)	The skills and attributes of a mature competent adult	<b>Mainstream</b>  Independent, self-reliant, separated, individually competent, with technical skills	<b>Relational</b>  Interdependent, connected, empathetic, emotionally competent, with relational skills

The arguments within this thesis have drawn on a number of different theories and concepts including orthodox and relational psychology (Watson, 2002), masculine and feminine logics of effectiveness (Fletcher, 1999), mainstream and relational theories of adult development (Miller, 1986) and Bakan's (1966) notions of agency and communion to describe alternative strategies for coping with anxiety and uncertainty. These are summarised in Figure 20. Whilst these theories and concepts initially appear to cover different issues, Figure 20 shows that they can be understood as related elements of two paradigms through which we are currently able to frame our understanding of the nature of human individuality, behaviour and development. What does this mean for the theoretical reformulation of management? Relational psychology has been shown to provide a more useful guide to understanding human behaviour, suggesting that management theories such as the process-relational perspective (Watson, 2002) which embody this paradigm need to become mainstream and dominant – but how? Perhaps this is the central task critical management education, to teach this new perspective, cohort by cohort. For the other elements in Figure 20 there is a danger that we think in terms of these being polarised opposites between which we must choose in order to 'get it right'. There is also a danger that aspects of the relational paradigm continue to be incorporated into the instrumental discourses prevailing within organisations, such that nothing really changes except for a long list of so-called 'soft skills' being added to definitions of an effective manager. Burgoyne *et al* (2004) noticed this trend with new capabilities such as emotional intelligence, empowerment, motivation and resilience simply being added to pre-existing competency lists. This completely overlooks the growth-fostering outcomes associated with the relational paradigm. Bakan (1966) invited us to think in terms of integration rather than specialisation, so maybe we need apply this thought process

when attempting to define outcomes from human endeavour which one might regard as valuable, and the skills and attributes of a mature competent adult. All of which suggests a need for interdisciplinary research, between scholars in the fields of psychology, sociology, adult education, organisation studies, business and management, in order to continue the task of developing the theoretical reformulation of management and the integration of these theories and perspectives into the practice of management education and learning.

## **9.2 Limitations of this study**

In Chapter 5, arguments were made for the choice of research strategy and research methods adopted throughout this study. However, there are a number of weaknesses which merit further consideration in order to be transparent about its limitations and to avoid similar issues in future research.

### **9.2.1 Timeframe**

Many of the weaknesses of this study flow from the intention in 2004 to submit for the degree of MPhil within 18 months. This created a condensed timeframe which resulted in a 'single snapshot' approach to data generation in 2005. However, in January 2007 my research was upgraded to PhD leading to a second round of data generation later that same year. If my original intention had been to submit for PhD, over a longer timeframe, then I believe I would have made different choices regarding the selection of research subjects and the methods for generating data.

Firstly I believe it would have been valuable to research one entire learning group throughout the whole of their learning experience and for a period thereafter. A

longitudinal study could have provided data about the research subjects' perspectives and practices *as they changed* rather than as retrospective recollections. Hence one of the key limitations of the research arises from adopting a 'double snapshot' rather than a longitudinal approach. Each research subject was interviewed twice and was asked to comment on current and past experiences and emotions. It is possible that the findings would have been different if the subjects had been interviewed before, during and after their programme of study. This would have provided richer accounts of their changes in practice and their emotional journey instead of a two snapshot accounts moderated by retrospective sense making. A longitudinal study would also have provided the opportunity to employ a more varied range of data generation methods. For example, following Brookfield (1994), additional data could have been generated by asking the research subjects to keep personal diaries, either in written or audio format, to capture regular accounts of their learning, practice and emotional responses. Some of the students on the Exeter programme maintained reflective learning journals but many of the entries did not relate to my research questions and equivalent data could not be obtained for all subjects so this data source was not used. A longitudinal study may also have provided the opportunity to pursue individual case studies in greater detail, based on initial findings. The findings presented within this thesis explicitly focus on some research subjects more than others because of the transformative nature of their learning and the significant changes which they described implementing within their work. Had these findings become apparent earlier in the research cycle, then individual case studies on selected research subjects may have yielded new insights. However, there remains value in the approach adopted within this study because it features the variation in experiences across a range of research subjects.

### **9.2.2 Organisational context**

In the literature review I criticised the empirical studies undertaken by Mintzberg (1973), Kotter (1982) and Stewart (1983) for focusing too much on ‘what practitioners do’ without taking into account who they are, how they think, the meaning other attribute to their actions, the organisational context, the social and cultural context, and the theoretical framework in which these actions took place. I was concerned not to make the same mistake within my research and yet to some extent I have. As a result of the methods which I have utilised, all of the data has been generated through conversations with the research subjects. Hence my understanding of their organisational context, the meaning their colleagues attributed to their actions and the theoretical framework in which these actions took place, comes entirely from the research subjects own accounts. For example, Kim expressed her frustration with the ‘bloody processes’ which she was supposed to follow in her original organisation, but we only have Kim’s word for this. In other post-structuralist studies (e.g. Fletcher, 1999) data has been gathered in respect of the organisational culture and specifically the definition of ‘good work’ within a particular setting. This has included documentation and narratives (obtained via interview) covering elements such as formal and informal reward systems, competency frameworks and success criteria. Such data has facilitated a more informed analysis of the theoretical frameworks, assumptions and beliefs influencing the way people work within a particular context. My research involved twelve people all working in different organisations hence there would have been practical constraints (resources and time) had I decided to replicate Fletcher’s (1999) approach. However, this suggests that there is value in designing a future study which focuses on the transfer of learning into a single organisation

because this will enable a thorough understanding of the organisational culture including norms of behaviour which it would be informative to take into account.

Fletcher's (1999) research, like Mintzberg's (1973) was based on structured observation in order to gather data about how people actually work, as opposed to how they say they work. At an early stage of my project I considered observing my research subjects doing their work but quickly ruled this out on the basis that I did not have the required skills, resources (funding) or spare time to undertake this activity effectively. Recognising that I ruled out this approach on the basis of practical constraints, could it have been a valuable research method? Looking back at my original research questions, I believe that structured observation would have been a suitable method of data generation but only in conjunction with other data sources. One of the questions was "How do the learning experiences influence their practice" hence I could have observed their practice and then made connections between this and the curriculum on their Masters programme. Similarly the question "What emotional responses do participants experience" could have been addressed by observing them both in the learning environment and back at work. This 'fly on the wall' approach is resource intensive and subject to a number of issues including the challenge of observing several subjects simultaneously in a learning process, and the researcher's act of interpretation in recording what has been observed. Such an approach would also not have been phenomenographic as this focuses on the phenomenon as described by the research subject. Therefore the choices made with regards to research strategy and method, were consistent with my desire to give voice to the 'manager as learner' perspective, and were not merely a consequence of

resource constraints. Having recognised this desire during my research, I refined my research questions accordingly as documented in chapter 5.

### **9.2.3 Developing research skills**

This project required me to develop a number of skills previously beyond my sphere of experience and learning. This included planning and preparing for transcribed semi-structured interviews, analysing qualitative data, and writing on a scale beyond anything I have ever undertaken in my life! What lessons have I learned from this? The interviews were extremely enjoyable and many of the research subjects expressed their appreciation for the opportunity to talk about themselves with several of them observing that their thinking developed as a result of the interview. Throughout the six-month period in 2005 when the initial interviews took place, my interview skills were developing all the time hence some of the later interviews are much richer in content than some of the early ones. Furthermore, the interview process suffered from technical and situational problems. Two interviews were undertaken in public spaces (a park and a hotel foyer) and in each case this was detrimental to the quality of the recordings. I had not appreciated that background noise would interfere in the digital recorder capturing two voices immediately next to the device. Also, one interview in a private house was frequently interrupted by the use of a chain saw in a nearby garden, but having flown all the way to Scotland, I had no intention of rearranging for another date! One interview had to be re-scheduled twice due to the bombings in London in July 2005 and the subsequent disruption to services later the same month. My research subjects and I were fortunate not to be personally affected by these atrocities. I have learned that research, like life, rarely goes to plan, and that the best one can do is set aside quality time in a quiet and relaxing space for an uninterrupted conversation!

Data analysis and interpretation were by far the most challenging aspects of this research project. The 2005 interviews were initially analysed in 2006 but then re-analysed in 2009 alongside the 2007 interviews, when I realised the inconsistencies and lack of rigour in my earlier approach. During the early stages of the research I had briefly considered the possibility of using Computer-assisted qualitative data analysis software (CAQDAS) such as NUD\*IST but had concluded that this was probably unnecessary given the relatively small volume of data (24 interviews). I was also concerned that it might not enable me to immerse myself in the data in a contextually sensitive way. However, while the manual approach enabled me to remain immersed in the data, it probably increased the man-hours involved in coding and re-coding the data and subsequently retrieving sections of the data for the presentation of findings. I also found it difficult to group and re-group the various codes into thematic summaries and I now understand that this process would have been easier using a CAQDAS tool. With hindsight, I believe I should have sought further advice on this aspect of my research rather than feeling that I had to work it out for myself. However, as a result of going through this laborious process and as a result of wrestling with the puzzles of coding and using qualitative data, I now have a much deeper understanding of how to embark on this type of research.

#### **9.2.4 Strongest criticism**

One of the strongest criticisms that might be leveled at this study is the decision to research subjects who were participating in two different Masters programmes.

Whilst these programmes shared a transformative intent, their curriculum and learning outcomes were dissimilar in many ways, and the people attracted to each programme were also in varying roles and career situations. At the outset of the research I

promised the research subjects confidentiality. Therefore, due to the small sample size and the relatively small cohorts attending each programme, this meant not identifying which programme was attended by each research subject. As a result it was not possible to present any analysis of the relationship between *specific elements* of their learning and how this informed their practice, or how it affected them emotionally. In response to this criticism one of the benefits of involving research subjects from two programmes, is that the study has presented a wide and interesting range of variations in the way mature people experience learning processes embodying a transformative intent. This could not have been achieved by focusing on one programme.

A further criticism which could be levelled at this study is the limited review of literature in relation to emotions, despite emotions featuring in one of the original research questions. How did this come about? Fineman's (2000, 2003) work views organisational phenomena through an emotion lens. These texts are authoritative and much cited but when the literature review was compiled Fineman's work was deemed to be outside of scope because it did not address the emotions associated with learning or transfer of learning. Within the domain of management education, there appears to be very little authoritative literature on the emotions experienced by adult learners. One valuable source has been Vince's (1996) work in relation to the emotions associated with experiential learning but aside from this, only Parrot (2001) has been referenced in order to support the coding of emotions within the data analysis. This appears to reveal two things. Firstly, there appears to be a lack of research and hence literature in respect of the emotions associated with learning and transfer of learning in relation to management education. As discussed in chapter 8, this territory seems to

have been studiously avoided by most educators. Secondly, it highlights the risk of apprentice researchers assuming that an everyday social phenomenon, such as emotion, will be self-evident within the research data rather than being complex, subjective and in need of careful definition. Another major point of learning!

### **9.3 Personal reflections**

This thesis has been a test of my intellectual ability and I hope that the reader will conclude that I have come up to the mark. However, in many ways it has been more a test of endurance due to some very difficult events which I have dealt with along the way. Commencing in late 2004, with initial interviews in 2005, I submitted an MPhil thesis in late 2006. After an upgrade to PhD in January 2007, I conducted further empirical research later that year but then everything changed. I stepped up from part-time to full-time work in September 2007, and in March 2008 my mother suffered a debilitating stroke after which she required frequent care for several months. I returned to my studies in late 2008 but my father died in March 2009 following which I was Executor, with my sister, to a complex estate. I returned to my studies in late 2009 and made the bold decision to re-analyse all of my data. On Good Friday 2010 our daughter suffered a severe facial trauma after colliding with a tree so my writing was once again cancelled for several weeks. I have not mentioned these events in order to evoke sympathy and I would never wish to blame my family for prolonging my research! I love them dearly. However, these events affected me deeply in both practical and emotional terms hence they serve as a reminder that my research subjects were possibly also affected by life's ups and downs throughout the empirical study. We cannot know how these events influenced the accounts given by them as it is impossible to disentangle their learning experiences from everything else which was happening in their lives at that time. However, what we do know is that life, work and

social science research are all fascinating, unpredictable, joyous and troubling just like the human beings whom we research and whom one day, we might understand.

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## APPENDIX A – INVITATION TO PARTICIPATE

### An Invitation (Exeter)

I am inviting you to participate in research which I am undertaking into management education.

As a part-time student on Lancaster's MPhil/PhD in Critical Management I have just come to the end of the taught phase of the programme. Like you I am now commencing research for my thesis. We are in similar situations!

#### **What is my area of interest?**

The purpose of this research is to gain a deeper of understanding managers' perceptions of critical management education, in particular the ways in which it has influenced their practice. (I should stress that I am using the term *manager* to include people who are in managerial and leadership roles.) In this context *critical* means education which goes beyond answers to normative questions (what should be done), and instead seeks to reflect on experience in order to answer questions such as - what is going on, why is this happening, what assumptions are we making and what larger social processes are our theory and practice part of (Burgoyne & Reynolds 1997). The MA in Leadership Studies is such a programme.

My research is based around the following questions:

- How do in-career managers perceive the consequences, positive and/or negative of participating in critical management education?
- Do in-career managers who undertake critical management education believe that they perform better as managers? If so, better by what criteria?

#### **What will be involved if you volunteer?**

I plan to conduct my research via semi-structured interviews i.e. there will be broad topics for discussion rather than a series of set questions. The topics will be shared with you several weeks prior to the interview to give you time to think. I will also invite you to offer extracts from your learning log where you feel that these supplement the interview conversation. However, there will be no pressure to share your learning log if you prefer not to. So, if you decide to volunteer then the commitment from you will be as follows:

- Thinking prior to the interview
- One interview lasting up to 2 hours at your place of work
- Providing a few photocopy extracts from learning log (optional)

The interviews will take place March to July 2005. Confidentiality will be ensured throughout. What's in it for you? All I can really say is that your involvement in this research will hopefully contribute towards a greater understanding of what experienced managers want from management education. You never know, we might also have some fun along the way! Interested? Please consider my invitation and then let me know.

### **An Invitation (Ashridge)**

I am inviting you to participate in research which I am undertaking into management education. As a part-time student on Lancaster's MPhil/PhD in Critical Management I have just come to the end of the taught phase of the programme. Like you I am now commencing research for my thesis. We are in similar situations!

#### **What is my area of interest?**

My research is based around the following question:

- How do in-career managers perceive the consequences, positive and/or negative of participating in critical management education?

The purpose of this research is to gain a deeper understanding of the experiences of senior people who have participated in critical management education. I am particularly interested in the relationship between the educational experience and their working role. In this context *critical* means education which goes beyond answers to normative questions (what should be done), and instead seeks to reflect on experience in order to answer questions such as - what is going on, why is this happening, what assumptions are we making and what larger social processes are our theory and practice part of. The Ashridge MA in Organisational Consulting is such a programme.

#### **What will be involved if you volunteer?**

I plan to conduct my research via semi-structured interviews i.e. there will be broad topics for discussion such as:

- How did you come to be on the programme?
- What's it been like?
- What are you experiencing as the effects?

I will also invite you to offer extracts from your personal journal where you feel that these supplement the interview conversation. However, there will be no pressure to share your personal journal if you prefer not to. If you decide to volunteer then the commitment from you will be as follows:

- Thinking prior to the interview
- One interview lasting 1 to 2 hours at your place of work
- Providing a few photocopy extracts from personal journal (optional)

The interviews will take place June to July 2005. Confidentiality will be ensured throughout. What's in it for you? All I can really say is that your involvement in this research will hopefully contribute towards a greater understanding of what experienced people get from management education, and what they want. We might also have some fun along the way! Please consider my invitation and let me know.

## APPENDIX B – INFORMATION SHEET FOR RESEARCH SUBJECTS

### Information Sheet (Exeter)

#### Aims and objectives

**To develop insights into how in-career managers perceive the effects of participating in critical management education.**

Within this general aim I am particularly interested in the **relationship between the educational experience and the participant's working role.**

I don't want to lead your thinking so my questions will be deliberately open. However, I want to make it clear that this is not an exercise on behalf of the Centre for Leadership Studies. I am not seeking lots of positive feedback on how good the lecturers were or how much you liked the venue! Neither will I disclose your comments to my colleagues at the Centre (see my notes on confidentiality). Instead I am hoping that you will feel able to share with me your thoughts about how the programme has interacted with and perhaps influenced your working role.

For this purpose I would like our discussion to be focused around three broad questions:

- How did you come to be on the programme?
- What's it been like?
- What are you experiencing as the effects?

Within these I envisage that we will explore more detailed questions such as:

- What were you hoping to achieve by doing this Masters programme?
- In what ways has your learning informed your working role?
- Have these experiences always been positive and helpful or have they been troubling or challenging?
- Are you aware of changes in the way you approach your work?
- If so, do you attribute these changes to the programme?

You may find it helpful to collect your thoughts around these themes prior to our conversation. In addition you may wish to share with me extracts from your **Learning Log** if you consider that these will provide examples of the ways in which you have been thinking about the relationship between the programme and your working role.

### Recording of the interview

It is my intention to tape record the interview and make additional hand-written notes. The interview will subsequently be transcribed and some key themes identified. I will then share my account of the interview with you so that you can confirm whether it is a fair summary. The simplest way to do this is perhaps to send you a written copy for us to discuss via the telephone.

### Permission to use material

The content of the interview will not be openly discussed with anyone other than yourself and my MPhil supervisor, John Burgoyne from Lancaster University. However, I would like your consent to publish extracts and my interpretations of the interview (transcription and notes) plus any learning log extracts (where provided) in a number of settings as follows:

- My MPhil Thesis
- Published papers (academic or practitioner journals)
- Conferences – if I am presenting a paper

Your permission will be sought in the event that I wish to use the material in any other way.

In each case, confidentiality will be maintained in the following way:

- Names will be excluded – there will be a fictitious synonym
- Direct reference to organisation will be excluded e.g. the RAF will become “a military organisation”

Elaine Dunn

12/4/05

## Information Sheet (Ashridge)

### Aims and objectives

**To develop insights into how in-career managers perceive the effects of participating in critical management education.**

Within this general aim I am particularly interested in the **relationship between the educational experience and the participant's working role.**

I don't want to lead your thinking so my questions will be deliberately open. However, I want to make it clear that this is not an exercise on behalf of Ashridge. I am not seeking lots of positive feedback on how good the lecturers were or how much you liked the venue! Neither will I disclose your comments to staff at Ashridge (see my notes on confidentiality). Instead I am hoping that you will feel able to share with me your thoughts about how the programme has interacted with and perhaps influenced your working role.

For this purpose I would like our discussion to be focused around three broad questions:

- How did you come to be on the programme?
- What's it been like?
- What are you experiencing as the effects?

Within these I envisage that we will explore more detailed questions such as:

- What were you hoping to achieve by doing this Masters programme?
- In what ways has your learning informed your working role?
- Have these experiences always been positive and helpful or have they been troubling or challenging?
- Are you aware of changes in the way you approach your work?
- If so, do you attribute these changes to the programme?

You may find it helpful to collect your thoughts around these themes prior to our conversation. In addition you may wish to share with me extracts from your **Personal Journal** if you consider that these will provide examples of the ways in which you have been thinking about the relationship between the programme and your working role.

### Recording of the interview

It is my intention to tape record the interview and make additional hand-written notes. The interview will subsequently be transcribed and some key themes identified. I will then share my account of the interview with you so that you can confirm whether it is a fair summary. The simplest way to do this is perhaps to send you a written copy for us to discuss via the telephone.

### Permission to use material

The content of the interview will not be openly discussed with anyone other than yourself and my MPhil supervisor, John Burgoyne from Lancaster University. However, I would like your consent to publish extracts and my interpretations of the interview (transcription and notes) plus any learning log extracts (where provided) in a number of settings as follows:

- My MPhil Thesis
- Published papers (academic or practitioner journals)
- Conferences – if I am presenting a paper

Your permission will be sought in the event that I wish to use the material in any other way.

In each case, confidentiality will be maintained in the following way:

- Names will be excluded – there will be a fictitious synonym
- Direct reference to organisation will be excluded e.g. the RAF will become “a military organisation”

Elaine Dunn  
12/4/05

## **APPENDIX C – INTERVIEW QUESTIONS 2005**

### **Group 1: How did you come to be on the programme?**

- How did you arrive at the point of wanting to do a Masters degree?
- What were the influences which led you to that point in your life/career?
  
- What was your rationale for doing the programme?
- What other programmes or development routes did you consider?
- What made you choose this one?
  
- What role were you doing when you started the programme?
- What were you hoping to achieve by doing this Masters?
- What were you hoping to get out of the programme?

### **Group 2: What's it been like?**

- What have you learned?
- How did your experiences compare with what you originally expected?
  
- Which aspects of the programme have you particularly enjoyed and why?
- Can you give me specific examples of learning experiences which you would describe as positive?
  
- Have any aspects of your learning on the programme been troubling?
- Can you give me specific examples of learning experiences which you would describe as troubling?
- How have you reacted to/dealt with these difficulties?
  
- How would you describe your relationship with the other students?

### **Group 3: What are you experiencing as the effects?**

- Do you feel differently about your work?
- Has your working role /career changed during or since the programme?
  
- Have you noticed changes in the way you approach your work? If so, can you give me a specific example?
  
- Have your colleagues noticed any changes in you? If so, can you give me a specific example?

## APPENDIX D – QUESTIONS MAY 2007

### Questions: Two years on!

#### 1) Changes in working practice – have these been developed/sustained?

In 2005 a number of the research subjects described how they had changed their approach to their work as a result of participating in their Masters programme. **If you regard yourself as one of this group**, please respond to the following questions:

- Reflecting on your work since mid 2005, how would you describe your experience of working and thinking about your work in new ways? Has this been easy, difficult, fun, hard work?!
- Have you felt able to further develop some of the changes you were experimenting with in 2005? If so, in what ways?
- Are there times when it has been a challenge to sustain some of these new approaches? If so, what types of difficulties or pressures have you encountered?

#### 2) Doing things differently – what are the consequences over time?

In 2005 a number of the research subjects described how they felt that they were operating in a way which was different to the ‘norm’ within their organisation or profession. **If you regard yourself as one of this group**, please respond to the following questions:

- What aspects of your practice do you regard as different to the ‘norm’? How does this compare with how you approached your work before you did your Masters?
- If you are ‘doing things differently’ to others within your peer group in your organisation, how does this affect the recognition that you receive? Are you being noticed and valued for your contribution?
- Does the reward and recognition which you now receive feel different in any way to how things were before your Masters?

#### 3) If neither of the above sections relate to you, please provide a short reflection on your working life since mid 2005. For example:

- Do you think your Masters influences your work in any way? If so, how?
- Have there been any significant changes in your work e.g. new job?
- Has your Masters generated any other ‘consequences’ which you would like to tell me about?!

Elaine Dunn, May 2007

## APPENDIX E – INTERVIEW QUESTIONS 2007

### Questions: Two years on! Interview questions

#### 1) Tell me about your current situation

- Where are you now working?
- What is your role?
- Is this different to what you were doing in 2005 when we last met?
- If different – what prompted the change?

#### 2) Doing things differently – different compared to pre-Masters?

In 2005 you described how you had changed various aspects of your approach to leadership and change as a result of participating in the Masters programme. ([\*Link to examples from transcript\*](#)) Reflecting on your work since mid 2005:

- Do you still think of yourself as doing things differently?
- If so – can you give me some examples?
  
- Have you felt able to further develop some of the things you were experimenting with in 2005? If so, in what ways?
- Has this been easy, difficult, fun, hard work?
  
- If it has been a challenge to sustain some of these new approaches, what types of difficulties or pressures have you encountered?

#### 3) Doing things differently – different compared to norm in organisation?

In 2005 you mentioned that some aspects of your approach to leadership and change were different to the ‘norm’ within your organisation or profession.

- What aspects of your practice do you regard as different to the ‘norm’?
  
- In terms of the way people approach leadership and change within your organisation, how would you describe what is regarded as the norm? For example, what types of behaviours are likely to lead to promotion? What attributes and behaviours help to get people recognised as an ideal leader or change agent?
  
- If you are ‘doing things differently’ to others within your peer group in your organisation, how does this affect the recognition that you receive?
- Are you being noticed and valued for your contribution?

Elaine Dunn  
October 2007

## APPENDIX F – LIST OF CODING CATEGORIES

### THEME: ENTRY TO PROGRAMME

Category	Definition: The research subject spoke about.....	
Reason for doing programme	Why they wanted to do their chosen Masters programme	
	Sub-category	Definition:
	Transitioning	Possibly moving into a new role or phase in their career
	Credibility	Wanting a qualification as a means of affirmation
	Developing practice	Wanting to improve their practice at work
	Developing self	Wanting to improve their knowledge or skills
Poor fit with org	Being aware that others saw them practicing in a manner different to the norm or expected behaviour within their organization	

**THEME: LEARNING - TRANSFORMATION**

<b>Category</b>	<b>Definition: The research subject spoke about.....</b>		
Challenging - goal orientations	Reviewing and revising their goals relating to career, work or life generally		
Challenging – worldviews	Reviewing and revising something fundamental in their belief system		
Challenging - mindsets	Reviewing and revising their mental models on which they based their practice		
	<b>Sub-category</b>	<b>Definition:</b>	
	Non-specific	Reviewing and revising their thinking in a way which is not specified in the sub-categories below	
	Assumptions/beliefs	Reviewing and revising an aspect of their previous assumptions or beliefs	
	Control orientation	Recognising and rejecting their controlling tendencies, <u>or</u> Reviewing and revising their earlier dependency on methods which were designed to control	
	Nature of orgs	Reviewing and revising their understanding of the fundamental nature of organisations	
	Nature of own role	Reviewing and revising their understanding of the nature and purpose of their role	
	Management methods	Reviewing and revising the methods, tool and models which they perceived to be useful in their role	

**THEME: LEARNING PROCESS**

<b>Category</b>	<b>Definition: The research subject spoke about.....</b>
Sense of personal change	Feeling that they had changed in some way as a result of their learning experience
Resisting self-reflection	Learning experiences in which they resisted or were reluctant to reflect critically on their assumptions, perceptions, mindsets, behaviours etc

**THEME: LEARNING WHAT?**

<b>Category</b>	<b>Definition: The research subject spoke about.....</b>
Understanding self	Developing a greater understanding of themselves in some way
Learning – to think critically	Learning to practice critical thinking (e.g. identify and challenge assumptions, recognize influences, be sceptical about knowledge)
Learning – about other viewpoints	Learning about ideas, theories, concepts, views which they had not encountered before
Learning – to notice	Learning how to observe people and situations in a way which generated new insights for them
Learning – to reflect	Learning to reflect and learning about the importance of reflection

**THEME: APPLICATION – CHANGES IN PRACTICE**

<b>Category</b>	<b>Definition: The research subject spoke about.....</b>	
Application – being reflective	Being much more thoughtful and reflective in their approach to work including thinking about problems from different angles/perspectives	
Application – broader perspectives	Using a broader range of ideas or perspectives to inform their work	
Application – new insights	Their learning experience enabling them to notice things within their organization which they had not noticed before	
	<b>Sub-category</b>	<b>Definition</b>
	General	A new insight of a type other than the sub-categories below
	Noticing	Feeling able to interpret behaviour (own and other people) in the midst of events
Application – experimenting	Experimenting with new approaches to their work as a result of their learning experience	
	<b>Sub-category</b>	<b>Definition</b>
	General	Experimenting with new approaches in way not specified in sub-categories below
	Allowing solutions to emerge	Not providing answers or solutions; working with people towards an unknown outcome
	Conversational	Focusing on conversations with individuals and small groups as the primary means for undertaking their work
	Less controlling	Deliberately avoiding trying to control situations, events or outcomes; not using control oriented methods
	People/relationship oriented	Working in a way which focused on trying to understand people and build relationships

**THEME: APPLICATION – APPROACH AND RESPONSE**

<b>Category</b>	<b>Definition: The research subject spoke about.....</b>
Application – cautious	Transferring their learning in a very careful way to avoid sudden/significant changes which might upset colleagues
Application – pragmatic avoidance	Avoiding the application of their learning in some situations where they believed it would be unhelpful or too disruptive
Application – challenging norms	Application of their learning resulting in them practicing in a manner which they perceived to be different to the norm or expected behaviour within their organization
Org response – positive	Receiving support and positive feedback from colleagues with regards to the application of their learning
Org response - puzzled	Perceiving that their new practices were viewed by colleagues as different to the expected behaviour within their organization

**THEME: EMOTIONS**

Parrott, W. (2001), *Emotions in Social Psychology*, Philadelphia: Psychology Press in [http://en.wikipedia.org/wiki/List\\_of\\_emotions](http://en.wikipedia.org/wiki/List_of_emotions) (19/11/2009)

Primary emotion	Secondary emotion	Tertiary emotions
Love	Affection	Adoration, affection, love, fondness, liking, attraction, caring, tenderness, compassion, sentimentality
	Lust	Arousal, desire, lust, passion, infatuation
	Longing	Longing
Joy	Cheerfulness	Amusement, bliss, cheerfulness, gaiety, glee, jolliness, joviality, joy, delight, enjoyment, gladness, happiness, jubilation, elation, satisfaction, ecstasy, euphoria
	Zest	Enthusiasm, zeal, zest, excitement, thrill, exhilaration
	Contentment	Contentment, pleasure
	Pride	Pride, triumph
	Optimism	Eagerness, hope, optimism
	Enthrallment	Enthrallment, rapture
	Relief	Relief
Surprise	Surprise	Amazement, surprise, astonishment
Anger	Irritation	Aggravation, irritation, agitation, annoyance, grouchiness, grumpiness
	Exasperation	Exasperation, frustration

<b>Primary emotion</b>	<b>Secondary emotion</b>	<b>Tertiary emotions</b>
	Rage	Anger, rage, outrage, fury, wrath, hostility, ferocity, bitterness, hate, loathing, scorn, spite, vengefulness, dislike, resentment
	Disgust	Disgust, revulsion, contempt
	Envy	Envy, jealousy
	Torment	Torment
Sadness	Suffering	Agony, suffering, hurt, anguish
	Sadness	Depression, despair, hopelessness, gloom, glumness, sadness, unhappiness, grief, sorrow, woe, misery, melancholy
	Disappointment	Dismay, disappointment, displeasure
	Shame	Guilt, shame, regret, remorse
	Neglect	Alienation, isolation, neglect, loneliness, rejection, homesickness, defeat, dejection, insecurity, embarrassment, humiliation, insult
	Sympathy	Pity, sympathy
Fear	Horror	Alarm, shock, fear, fright, horror, terror, panic, hysteria, mortification
	Nervousness	Anxiety, nervousness, tenseness, uneasiness, apprehension, worry, distress, dread

**THEME: MENTAL STATES**

Lazarus, R. (1991) *Emotion and Adaptation*, Oxford: Oxford University Press in <http://www.emotionalcompetency.com> (19/11/2009)

Richard Lazarus list several mental states that may be emotion related, but are not themselves actual emotions.

<b>Category</b>	<b>Mental states</b>
Complex states	Grief, depression
Ambiguous positive states	Expansiveness, awe, confidence, challenge, determination, satisfaction, being pleased
Ambiguous negative states	Threat, frustration, disappointment, helplessness, meaningless, awe
Mental confusion states	Bewilderment, confusion
Arousal states	Excitement, upset, distress, nervousness, tension, agitation
Pre-emotions	Interest, curiosity, amazement, anticipation, alertness, surprise

# APPENDIX G – MATRIX OF RESEARCH SUBJECTS & CODING CATEGORIES

Theme	Category	Sub-category	TRANSFORMING			TRANSITIONING			DISMANTLING	BROADENING						
			Amy	Hugh	Ian	Fiona	Gill	Kim	Dave	James	Ben	Chris	Edward	Lucy		
Entry to prog	Poor fit with org Reason for doing prog	Transitioning Credibility Develop practice Develop self	Y (old)		Y			Y (old)		Poss		Y	Y			
			Y			Y			Y		Y		Y	Y		
				Y	Y		Y				Y				Y	
			Y		Y		Y				Y	Y				
Learning - transformation	Challenging - goal orientations Challenging - worldviews Challenging - mindsets	Non-specific Assumptions/beliefs Control orientation Nature of orgs Nature of own role Management methods	Y			Y		Y	Y	Y			Y (after)			
				Y					Y							
					Y		Y	Y			Y					
			Y				Y						Y			
				Y	Y							Y				
				Y	Y	Y		Y				Y				
Learning - process	Sense of personal change Resisting self-reflection		Y	Y		Y	Y	Y	Y			Y	Y	Y		
					Y						Y					
Learning - what?	Understanding self Learning - to think critically Learning - about other viewpoints Learning - to notice Learning - to reflect		Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y		
				Y				Y			Y	Y	Y	Y		
				Y				Y		Y		Y	Y	Y	Y	
				Y				Y	Y			Y	Y	Y	Y	
Application - changes in practice	Application - being reflective Application - broader perspectives Application - new insights Application - experimenting	General Noticing General Allow solutions emerge Conversational Less controlling People/relationships			Y						Y	Y	Y	Y		
			Y	Y	Y		Y	Y	Y	Y	Y	Y	Y	Y		
			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y		
			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y		
			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y		
			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y		
			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
Application of learning	Application - cautious Application - pragmatic avoidance Application - challenging norms Org response - positive Org response - puzzled		Y	Y	Y	Y	Y		Y		Y	Y		Y		
					Y				Y			Y				
			Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y		
			Y	Y		Y		Y (new)			Y	Y				
				Y	Y			Y (old)				Y				
<b>CONTEXT</b>	Changed employer		New role	No	Yes self employ	n/a	n/a	Yes	n/a	No	No	No	No	n/a		
<b>JOURNEY DESCRIPTOR</b>	Troubling emotions during prog Troubling emotions after prog Much more positive after prog Change in meaning perspective Significant change in practice		Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No		
			No	No	Yes	No	No	No	Yes	No	No	Yes	No	Yes		
			Yes	Yes	No	Yes	Yes	Yes	No	No	No	No	No	No		
			Yes	Yes	Yes	Poss	Poss	Poss	Poss	No	No	No	No	No		
			Yes	Yes	Yes	Yes	Yes	Yes	Yes	No	No	No	No	No	No	

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