WHEN LIFELONG LEARNING ISN'T ENOUGH: THE IMPORTANCE OF INDIVIDUAL AND ORGANISATIONAL UNLEARNING

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ABSTRACT

As organizations increasingly strive to maximise the utility of their human capital, many encourage lifelong learning, and some have adopted formal knowledge-management strategies. There is an ever-growing body of research relating to organizational learning and knowledge-management (Easterby-Smith, Burgoyne, & Araujo, 1999; Markoczy, 1994; Nonaka, 1994; Starbuck, 1996), particularly since the transition to the “knowledge era”. There has been more recent focus on the topic of unlearning both at an individual and organizational level. It is proposed in this paper that these four concepts are interrelated, and a model for linking these is put forward.

INTRODUCTION

Organizations need to develop specific capabilities to remain competitive. As the business environment is not static, a successful company must be dynamic and ready to change and re-orient core competencies in order to deal with new environmental challenges, utilizing dynamic organizational capabilities (Teece, Pisano, & Shuen, 1997). An organization’s competitive position stems from its internal capabilities (Amit & Schoemaker, 1993). Knowledge-based resources are characterised by “uncertain imitatibility” (Lippman & Rumelt, 1982), which renders them relatively unprotected from imitation, so that competitors can develop similar or even superior knowledge-based resources. Such imitation normally takes time and organizations with superior knowledge-based resources can develop their own assets further by engaging in ongoing learning (Miller & Shamsie, 1996). In seeking to develop a culture and commitment to learning and change there needs to be a focus on a firm’s capability to renew its managerial competencies and to create radically new competencies in order to “… achieve congruence with the changing business environment” (Teece et al., 1997, p. 515). In facing dynamic market requirements and new competitive situations, learning processes can affect the capability to reconfigure and transform a firm’s assets and competencies.

However, simple learning, and developing new competencies and capabilities, is not enough, as Hedberg (1981) argues...
There is too much waste of human resource, capital, knowledge, and enthusiasm in letting organizations develop with learning abilities only. Such organizations build walls around them, and grow defensive. They become insensitive to signals from the environment, and they accumulate so many resources that they cannot afford to move when times are changing. That is why abilities for learning, unlearning, and relearning must be equally developed. To learn, unlearn, and relearn is the organizational walk: development comes to an end when one of these legs is missing. (p. 23)

Therefore, this paper identifies links between individual and organizational learning, and the importance of unlearning in this process, in order to ensure that lifelong learning remains an organizational priority.

ORGANIZATION AND INDIVIDUAL LEARNING

Learning in an individual, collective, or organizational sense does not occur in isolation. Rather it occurs within the constraints of both the internal and external environment, and not all environments are conducive to or supportive of learning. In addition, there is a growing argument that focusing on learning alone will not allow for lasting individual or organizational growth and change; the key purpose of encouraging lifelong learning. Many researchers have identified factors which inhibit individual and organizational learning; one of the significant issues being the interference of previous learning, knowledge, and skills (Baxter, 2000). Rather than just focusing on how to provide new skills, it has been shown that prior to, or at least simultaneously, old knowledge and skills must be challenged and unlearnt.

In order to show this link between individual learning and unlearning, and organizational learning and unlearning, as well as the impact of the internal and external environments, a model is proposed in Figure 1.

**Figure 1. Model of individual and organizational learning and unlearning.**

This model proposes that the concept of unlearning at both an individual and organizational level plays a part in the overall learning that occurs. However, it also recognises that a number of factors relating to both individuals and organizations will have an impact on the ability to learn. Finally, it proposes that the external environment in which an organization operates will also have an impact on the amount and significance of the learning that takes place at both the individual and organizational level. It is the purpose of this paper to establish and clarify the links between these four areas of individual and organizational learning and unlearning, and to examine the impact of both internal and external factors on this relationship.

INDIVIDUAL LEARNING AND UNLEARNING

The importance of learning, not only for individuals, but also for the organization in which they work, has long been recognised as a crucial factor in organizational strategy and sustainability (Anderson & Boocock, 2002;
Senge, 1990). Knowles (1970) became a renowned researcher in the field of adult learning by putting forward a number of arguments about the need to recognise the difference between child and adult learners. As a result, the term “andragogy” became utilised to describe an orientation focused on the particular characteristics of adult learners. Knowles (1980) suggested that adult learners should be encouraged to be self-directed, that their experience in the learning situation should be viewed as valuable, that they will be ready to learn when they see a need for such knowledge and that they will view learning not as simply content matter, but as a means for self-development and fulfilment. Therefore, it is crucial that those in organizations responsible for encouraging a focus on lifelong learning understand these principles. However, with the valuing of previous experience comes a more recently identified issue: that of unlearning, and the problem of identifying when it is in fact valuable, and when it is an impediment to further development.

As opposed to the area of adult learning, the topic of unlearning has received much less consideration. Many researchers previously have inferred the existence of issues relating to the interference of prior learning in the learning process, even if they have not referred to unlearning as such; as Anderson and Boocock (2002) state:

Learning arises out of the tension between ‘new’ knowledge and the ‘old’ knowledge stored in the memory of an individual. In this context learning occurs when concepts, frameworks and capabilities are created or redeveloped in the light of knowledge that is new to the individual.

It can be argued that the need to consider the impact of prior learning on the process of learning is crucial to ensuring effective lifelong learning. If individuals are not able to successfully unlearn past skills, knowledge, or frames of reference that no longer apply, then they will be less likely to embrace new ways of working.

There are some key researchers who have proposed models in relation to unlearning. Hedberg (1981) suggests that new knowledge simply replaces old knowledge as an individual learns more. It is also reinforced that this process is not the same as forgetting where information is lost regardless of its usefulness. Hedberg (1981) sees the two processes as happening simultaneously, proposing that knowledge both increases and becomes obsolete, or is discarded as the situation changes. This discarding activity is often referred to as unlearning and it is seen to be as crucial as gaining new knowledge. In contrast, Klein (1989) put forward a parenthetic model of unlearning suggesting that the old knowledge is not erased, but maintained (in parentheses as it were) for situations where an individual believes the new knowledge does not apply. In this sense, it is being argued that the context of application of particular skills and knowledge is a key factor.

In the model proposed in Figure 1, it is assumed that individual unlearning is connected to individual learning. Klein (1989) also explains this in terms of understanding unlearning, not as a concept in its own right, but as part of an ongoing process of change, development, and learning. It has been identified that in many cases, prior learning can in fact inhibit the acquisition of new knowledge and skills (Baxter, 2000). Work in this area refers to proactive inhibition, or “the brain mechanism responsible for maintaining and preserving everything we know… a case of the old interfering with the new…” (p. 13). Therefore, it is argued that rather than simply focus on individuals and their learning in an organizational context, there must also be a focus on assisting individuals to recognise and overcome the restraints placed upon them by prior learning and knowledge. The literature relating to individual transition and change often refers to this important step of acknowledgement and release of previous mental models and theories of action (Bridges, 1991; Conner, 1992)

Therefore, the two areas of learning and unlearning at an individual level cannot be viewed separately. In certain circumstances, unlearning will be more or less important to the overall goal of learning and development. For example, when skills, behaviour and mental models are long-held and have been positively reinforced for a long period of time, then the stage in the learning process of unlearning will be more important.

Many examples of the importance of individual unlearning can been seen when observing organizations (and often entire industries) undergoing change. Heavy industry within
Australia has experienced many challenges in ensuring all individuals focus sufficiently on workplace health and safety issues. In many cases, it is those with the most experience who are seen to disregard new safety directives in favour of the practices with which they are familiar. In this sense then, those people in an organization who may be considered experts, may well present the greatest challenge in terms of ensuring that unlearning occurs.

MODERATING FACTORS AT AN INDIVIDUAL LEVEL

Learning and unlearning at an individual level however, does not occur in isolation. There are a number of moderating factors that can impact either positively or negatively on the amount and depth of learning and unlearning that occurs in individuals. These can be broken into two categories; tangible and intangible factors. Whilst there is a great deal of literature on most of these factors, the extent of the impact on unlearning remains to be established.

Tangible factors impacting learning and unlearning in individuals are relatively easy to identify and to measure, and therefore, it can be assumed, easier to address. In particular, these may include the explicit knowledge, experience, education, training, and qualifications of the individual. Researchers in the area of knowledge management (Newell, Robertson, Scarbrough, & Swan, 2002; Nonaka & Takeuchi, 1995; Roy & Roy, 2002) have identified the difference between explicit and tacit knowledge and suggest the former refers to easily-expressed and easily-documented knowledge or information. Therefore, this type of knowledge is generally found in organizational procedures and processes, and it could be assumed that even though this knowledge has the potential to impact on the learning and unlearning process, the more fully it is articulated, the more easily it is addressed. In the same sense, the background, education, and formal training that an individual brings to the learning (and unlearning) process will impact on personal theories of action and frameworks that may no longer apply.

Alternately, intangible factors in learning and unlearning relate to issues less able to be measured or easily examined, and therefore are less likely to be able to be observed in relation to the learning and unlearning process and subsequently addressed. Their impact on the process of learning and unlearning, however, is nonetheless substantial. These factors may include issues such as the tacit knowledge of the individual, personality, attitudes, beliefs, individual capacity to learn and unlearn, and learning styles. Tacit (or implicit) knowledge, relates to information not easily explained or documented, and is often referred to as know-how (Newell et al., 2002). Importantly, it is this tacit knowledge that often makes the difference between an average and an excellent employee – not necessarily what they do, but how they do it. Newell et al. (2002) suggest there are a number of reasons why this tacit knowledge is not easily explained or documented. However, regardless of the reason, it is clear that if an individual is unable to articulate knowledge that has the potential to impact on the learning and unlearning processes, it will be far more difficult to address than if the knowledge were explicit. Likewise, individual ability, personality, and learning styles - and social and cultural factors - have the potential to impact upon the quality and quantity of both learning and unlearning, as they determine the individual’s outlook on personal change and development.

ORGANIZATIONAL LEARNING AND UNLEARNING

As well as developing our understanding of individual learning and unlearning in the workplace, it is also important to consider organizational learning and unlearning. It has been proven that in addition to the learning and development in individuals, organizations as a collective also have the ability to learn – to an extent that is well beyond the reach of any one individual. (Appelbaum & Gallagher, 2000; Nonaka & Takeuchi, 1995) This means that long after old ways of operating and acting as a collective are applicable, some organizations continue to allow their internal systems and processes to reinforce these approaches.

Easterby-Smith (1997) argues that learning is crucial in building competitive advantage and as such the organization should be concerned with building learning competencies. In studying organizational learning, Senge (1990), Huber (1991), Walsh and Ungson (1991), and Nonaka and Takeuchi (1995) maintain that there are several elements defining organizational learning: the creation (and change) of shared mental models; a constant process of alignment with their environment taking place in complex and dynamic processes involving the creation,
processing, transfer, and storage of implicit and explicit knowledge throughout the organization; and finally; is goal-directed. Most importantly, these definitions highlight the concept of shared mental models, or theories of action operating in a dynamic environment.

So organizational learning is an iterative ongoing process that takes place through the life cycle of an organization. Stakeholders within an organization need to continually update their knowledge and skills through learning if they are to contribute effectively to organizational learning. In this way organizational learning becomes lifelong learning for both individuals and the organization. However, just as learning is only one part of the equation for the individual, this will also be the case at an organizational level. If organizational learning involves the creation and change of shared mental models, then unlearning will remain a key priority. Unlearning in an organizational sense therefore, will involve the replacement or updating of these models in order to ensure that individuals and the organization as a whole does not revert to old ways of operating.

Both Hedberg (1981) and Klein (1989) have identified models to explain how unlearning occurs. These are no less applicable at an organizational level as at the individual level. In fact, it is claimed that the lack of ability to engage in unlearning at the collective level is a “crucial weakness of many organizations.” (Hedberg, 1981, p. 3) Again, this will mean that both learning and unlearning at the organizational level are closely linked. In some cases the organization may see the need for radical unlearning, if the behaviours are too tightly ingrained and are to the detriment of the organization as a whole. In situations such as this, management may make the decision to outsource a function such as maintenance (see Hyland, Sloan, & Barnett, 1998) and so the maintenance capability is unlearned in the organization. Management needs to be able to judge whether radical or incremental unlearning is required.

MODERATING FACTORS AT AN ORGANIZATIONAL LEVEL

Just as learning and unlearning at an individual level are impacted by external factors, so too are learning and unlearning at an organizational level. Many writers (Delahaye, 2000; Stacey, 2003) in the area have referred to the existence of both tangible and intangible factors – referred to as the legitimate and shadow systems operating within an organization. It is argued that both these systems have the capacity to either encourage or discourage both learning and unlearning at the organizational and individual levels.

Within the legitimate system, organizational policies, structures, procedures, practices, and processes are embedded with organizational theories of action and particular frames of reference. For example, policies and procedures are developed within organizations to encourage and reinforce particular behaviours. When these behaviours no longer contribute to the ongoing development and sustainability of the organization, they become a hindrance, and even if individuals are able to learn, the existence of old ways of operating will impact on the behaviour of any single individual. Therefore, it is imperative that the legitimate system keeps pace with the learning occurring within the organization. Failure to do so will hinder the process of unlearning.

In addition, intangible factors (i.e. the shadow system) within the organization are not as overt, but still play a large part in either assisting or hindering learning and unlearning at both the collective and individual level. Organisational culture, power, and politics, and organizational filters and theories of action, are all difficult concepts to measure in a practical sense but are no less an influential on the ability of the organization to unlearn. In the shadow system, informal structures and a culture emerge that either encourage individuals to question current ways of thinking and to challenge the status quo; or they send a message of compliance and acceptance of current organizational procedures and processes.

THE EXTERNAL ENVIRONMENT AND ITS IMPACT ON LEARNING

It has been argued that the external environment and the organization will have direct impacts on one another (Buckler, 1997). That is, the environment in which an organization operates will directly impact on strategies within the organization, and the actions of the organization itself also has the potential to impact on the external environment in which it operates. A wide variety of social and cultural pressures, as well as market forces, are having an impact upon organizations and the amount of learning
required to remain sustainable. At present, markets are experiencing the internationalisation of technology-driven competition, globalization of manufacturing due to faster transitional flows of materials and money, compression of product life cycles, the need for greater integration of technologies, and increasingly sophisticated customers (Shepard & Ahmed, 2000). These challenges have inevitably resulted in many organizations turning to innovative measures and strategies.

Thomas (1993) in a study of industrial policies in ten nations, concluded that a very demanding external environment can be conducive to innovation. Further, Afuah (1998) argues that factors such as natural resources, skilled labour, capital, universities and private research laboratories (which are a supply of scientific, technological and market knowledge), can be sources of local advantage. Supported by such a platform of excellence, new ideas can be nurtured into products and services. The nature of the local demand for products and services reflect the local firm’s ability to innovate, and some studies of regional clusters have shown a common pattern of smaller innovative firms clustering around a larger client with extended market reach. Customer needs, preferences, and expectations should be broadly articulated to organizations and provide some focus for them in their innovative thinking. In addition, suppliers can be critical in generating new product or service ideas, and supporting them through subsequent development and commercialisation. Local rivalry can improve the ability of firms to innovate. Firms may pick up knowledge from each other, and build on it to improve and survive; with this leading to more innovative ideas. Finally, government policies in most countries assist organizations to innovate through funding, assistance, consultancy, and other policies.

DISCUSSION AND CONCLUSION

The model put forward in Figure 1 can be validated by a wide range of works. The model however, draws together some of the work on organizational and individual learning in a different way that provides some understanding of the need and effects of unlearning. As organizations seek to survive in an increasingly turbulent environment, managers need to be aware of both the past and the future. In understanding the past they will understand the basis of the existing organizational culture and perhaps some of the sub-cultures. If they can understand how the culture has evolved, they will recognise that for effective long-term learning both individuals and the organization as whole needs to unlearn. Many managers seeking to be competitive and innovative have sought to introduce new cultures into the organizations they manage. Those who fail to recognise the need to discard the past and ensure most if not all the old ways of surviving and succeeding have been expunged will have to invest massive amounts of time and effort in re-enforcing the new ways. However, re-enforcing the new ways is not sufficient, as many organizations have found out, if they cannot de-program the old habits of individuals then as they have done in the past they will have to rid the organization of the individuals.

Links have been established between the concepts of individual and organizational learning and unlearning. In addition, it is clear that there exist a number of internal and external factors that impact upon the individual and organization’s ability to unlearn. Exactly how and when in the overall process of learning, unlearning occurs, still requires further research. In addition, it will be imperative for future research to focus more heavily upon the relative impact of moderating factors on the process of unlearning in particular. In essence, it is important for those encouraging and promoting lifelong learning to understand the nature and strength of the links between unlearning and learning at both the individual and organizational level. By understanding the process of unlearning at both the individual and organizational level, and the factors that can assist and hinder the process, it is possible that organizations embarking on organizational change initiatives will do so armed with the ability to instil in both individuals and the organization a focus on lifelong learning.

REFERENCES


