Emotion in Organizational Learning -Implications for HRD

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In this article I draw attention to the under-researched domain of emotion in the study of organizational learning and its implications for HRD..The paper identifies four aspects of organization learning in which an emotional dimension is evident. These are: Emotion as a learned response, Emotion as codified meaning, Emotion as affective component of learning, Emotion as display rules. The paper concludes by proposing that further research into each of these four domains will potentially enrich both HRD scholarship and practice through an enhanced understanding of organizational learning and emotion.

Keywords: HRD, Emotion, Organizational Learning

A growing interest in organizational learning amongst HRD scholars has led to a desire for a deeper understanding of the theoretical frameworks that underpin this field, with a view to considering the practical implications for organizations. Despite this burgeoning interest and growing number of empirically-based studies of both emotion and organization learning from a socio-cultural perspective, few scholars have asked how an understanding of emotion might inform interpretive studies of what is deemed *learning* inside so-called *communities of practice* or organizational *cultures*, and what the implications of this might be for our understanding of HRD. It is this gap that the paper sets out to address.

Theoretical Framework

Cultural and Situated Approaches to Organizational Learning

The contribution of both Lave and Wenger's (1991) book, Situated learning – legitimate peripheral participation" and Cook and Yanow's (1993) paper, "Culture and Organizational Learning" have been widely acknowledged as being seminal in the field of Organization Learning, opening up new debates about the conceptualisation and purpose of its study (Nicolini and Meznar, 1995; Gherardi et. al, 1998; Vince, 1999; Fox, 2000,) as well as being implicated in the "scattering" of "its community of scholars among several streams of thought and internal controversies" (Gherardi, 2000, p. 1059).

These perspectives, often labelled, respectively, the Community of Practice perspective (Brown and Duguid, 1991; Fox, 2000) and the Cultural – Interpretive approach (Yanow, 2000) have added to "the languages of Babel" (Gherardi, 1999) which coexist, sometimes uncomfortably, within the embrace of Organizational Learning. At the time of their publication, they offered a radical challenge to the dominant cognitive conception of learning in organizations, which, rooted in cognitive psychology, held that learning should always be perceived as an intentional act (Huber, 1991) performed in the interest of organizational improvement. Researchers began to ask how meaning becomes shared within social groups, and how the knowing required to operate successfully within a social grouping is transmitted and becomes understood by newcomers to that group. Other lines of inquiry from this perspective have followed, asking, for example, how the situated metaphors adopted by work groups can both facilitate and reveal learning (Gherardi, 2000); how communities of practice enact and learn practices of safety (Gherardi and Nicolini, 2000); and how national cultural differences affect the nature and processes of organizational learning (Taylor and Easterby Smith, 1999).

Whilst the Community of Practice perspective initially developed independently from the "cultural" perspective, there is clearly a conceptual overlap in studying the work group as a culture or as a community of practice (Yanow, 1999).

Both are generative metaphors for the study of the social dimensions of learning, and are ontologically and methodologically compatible (Yanow, 2000), although "culture" comes from the discipline of anthropology, whereas "community" is the language of sociology, community organization and urban planning (Yanow, 1999).

Socio-Cultural Approaches to the Theory of Emotion

In parallel with this marked shift in the organizational learning field away from the problem solving approach towards socio-cultural understanding, or as Gherardi (1999) has put it: "learning in the face of mystery", a shift has simultaneously been taking place amongst scholars of emotion (Domagalski, 1999).

Like learning, the study of emotions also has its roots in psychology, which conceptualised emotions as being located inside the individual body, spilling over involuntarily in response to certain events. Emotions were considered to be the same universally, and an emphasis on positivist research in this field remained relatively unchallenged until the publication of Harré's "The Social Construction of Emotions" (1986). The fundamental challenge made by Harré and his colleagues to traditional emotion theory was that emotions are socially constructed, contextually situated, and therefore that anthropological studies of different cultures reveal quite distinct variations in the language, display, description and experience of emotion. Harré's (1986; 1996) edited collections make convincing arguments for emotions being socially constructed within a cultural context and *learned* within cultures. The implications of this for the cultural interpretive approach to organization learning and therefore for HRD are clearly far-reaching.

Heelas's (1986) anthropological research into emotion found a clear connection between "emotion talk" and the moral domain. He found evidence of considerable variation in attitudes towards the *management* of emotions across cultures, suggesting that this occurs through a complex interaction between the moral order, the powers which are ascribed to emotions, and the loci, generation and dynamics of emotion. Drawing on Hochschild (1983) to reinforce the suggestion that emotions are ideological, Heelas suggests that the study of "emotion talk" can function as "a kind of spotlight".

It is this anthropological approach to the social construction of emotion, as illustrated by Harré and Heelas's work, that has informed and framed the analysis and discussion contained in this paper.

It is only very recently that a social constructionist understanding of emotion has been incorporated into the organization studies agenda, initially tending to focus on the "dark side" (Fineman, 2000) of emotions, the subordination of workers in organizations through covert forms of control, and pressures to conform and display emotions appropriate for the organization's performance (e.g. Hochschild, 1983; Ashforth and Humphrey, 1993; Turnbull, 1999; Martin et.al, 2000). Arguably, it was not until the publication of Fineman's (1993) "Emotion in Organizations" (in the same year as Cook and Yanow published their article on culture and organizational learning) that interest in the social construction of emotion as an interpretive approach to studying meaning and relations inside organizations started to become legitimised as part of the research agenda.

The crux of many of the key debates in the field of emotion study, like that of organizational learning has focussed on the constitution of the *self.* Post-structuralists have rejected the modernist view of the self as "the centre of consciousness" implied by psychodynamic theory (Gherardi, 1995), inquiring instead into the way power relations and the subject are constituted through emotion discourse. Swan's (1994) study of the gendered nature of emotion, as demonstrated through the accounts of women managers, is a useful example of this perspective.

The difficulty of defining emotion, and the ontological and epistemological debates around the topic have contributed to it being seen as complex, hidden and difficult to uncover, one reason, suggests Fineman (1993; 2000), why scholars have avoided researching this area for so long. He has argued, however, that studying organization without attention to the affective domain is to ignore a fundamental aspect of the lived experience in organizations, an argument that I will now apply to the study of organizational learning.

Emotion in Cultural Approaches to Organizational Learning

Not only are emotions an integral part of learning to belong, suggest Putman and Mumby (1993), they are also a crucial component of building a "community". Much research into group life supports the view that emotion is embedded into the norms, beliefs, and values of social groups. Swogger's (1993) study, for example, found that group members were constantly talking about their "feelings of satisfaction and fulfilment and the personal meaning the group had for them" (1993, p.100). Setting this argument in its broader context, Hosking and Fineman (1990) argue that there are four interdependent processes of organizing: cognitive, social, political and emotional. Implicit in this statement is the notion that newcomers or apprentices to a Community of Practice will need to understand all aspects of these processes in order to become fully functional, and to lose their peripheral status.

In his situated learning study of newcomers in "coercive" settings, Fuhrer (1993) identifies *social embarrassment* and *social anxiety* as crucial catalysts in the learning process. He concludes by arguing for an approach to interpreting situated learning that includes the emotional dimension. Fineman (1997) has also raised the issue of emotion in *learning* in an article in which he introduces the concept of "cogmotion" to suggest that cognition and emotion in organizational learning are often falsely separated. The emotional dimension of the relationship between *power* and learning is made explicit by Coopey (1998), who argues that workplace learning may be suppressed by anxiety and other emotions associated with revelation and exposure. More recently Vince

(1999; 2000) has also made a similar connection, arguing that an attention to the relationship between power and emotion offers new opportunities for understanding the systemic and strategic aspects of organizational learning.

Despite these persuasive arguments for an emotional dimension to be included in the study of organization learning, however, the subject of emotion is entirely missing from the early book on Communities of Practice, with Lave (1991). Lave and Wenger (1991) portray those at the periphery as emotionless seekers after the knowledge of the old-timers. Rivalries and envy are erased from these commentaries on Communities of Practice, and the rhetoric becomes one of truth-seeking (Obholzer, 1994)

Wenger does acknowledge in his later book (1998) that participation in social communities "is a complex process that combines doing, talking, feeling, and belonging. It involves our whole person, including our bodies, minds, emotions, and social relations"(1998, p. 56). This brief allusion to the affective component of participation is touched upon once more later in the book. However, the importance of emotion is not developed further by Wenger, and as has been shown, has received little attention from subsequent organizational learning scholars. Marsick and Watkins (1997) note this omission in their own research into informal and incidental learning. It is this omission that this paper will now seek to address.

Methodology- A Social, Cultural *and Emotional* Reading of Wenger's (1998) Alinsu vignettes

In the following discussion, I will illustrate the way that a spotlight on emotion can illuminate understanding of some of the main premises of the cultural-interpretive approach to organizational learning, by drawing on data from Wenger's (1998) ethnographic account of claims processors in Alinsu. Wenger uses two *vignettes* (pp. 18-38) to illustrate how situated learning takes place within social groups. Throughout these vignettes his accounts are laden with emotional language, but in his analysis this is entirely disregarded.

My analysis focuses on the story of Ariel who has recently joined a team of claims processors in an insurance company. Their work, to calculate and process customer claims, follows formal procedures as laid down by the company, but much of the knowledge required to become efficient is tacitly held by the community of practice. As a newcomer, Ariel is keen to learn from her colleagues how to calculate these claims accurately and efficiently, how to fit in with the group she has joined, and to deal appropriately with the customer telephone calls which constantly interrupt her computerised routines. Each claims processor is monitored by a department which randomly checks her work, rejecting mistakes and rewarding accuracy.

The methodology for this research involved a textual analysis of Wenger's vignettes. Highlighting throughout the text each observable manifestation of emotion, by type, function, context, apparent impact on learning and to whom it was attributed, I sought responses to the following questions:

> What types of emotion were present in the vignettes?
> What function did these emotions appear to be playing?
> What did the emotions appear to mean to those feeling or displaying them?
> What types of events were generating emotional responses, behaviours or displays?
> How did these appear to be impacting on both individual and collective learning?

Conscious that I was interpreting Wenger's account second hand, and therefore that the data had already been filtered by Wenger's ways of seeing, my purpose was not to throw light on the Alinsu case specifically, but to discover how the study of emotion in a community of practice might illuminate our understanding of organizational learning. To make these connections more clearly, I then returned to some of the key concepts contained in the cultural-interpretive approach to Organizational Learning, to ask how the emotional experiences and displays demonstrated in these vignettes might be re-interpreted through this lens, and thus how they may add insight to the domain of organizational learning and HRD.

Findings

The findings of this analysis revealed four aspects of emotion in organizational learning. The data suggested that Ariel and her colleagues in the community of practice were continuously learning to:

1. *deal with the impact* of their emotional responses on their learning.
2. *feel and experience* emotions.
3. *ascribe meaning* to the experience of these emotions.
4. *display* emotions for the purpose of becoming accepted members of the community.

I have summarised these aspects of emotion in organization learning as:

1. Emotion as affective component of the learning process.
2. Emotion as a socially learned response.
3. Emotion as codified meaning.
4. Emotion as display rules.

Each of these will be illustrated below.

Emotion as Affective Component of the Learning Process

In the vignette, there are many examples of Ariel and her colleagues having to deal with the impact of their emotional responses on their learning. The first expectation that Ariel places upon herself is that she should quickly become competent. Gherardi (1999) has pointed to the concept of learning-in-practice and the shared focus on newcomers becoming "competent" in the practice. This competence includes responding with the appropriate behaviours and emotions to events, as well as mastering the technologies associated with the practice.

In the vignette, Ariel's initial lack of competence in the practice of the community leads her to experience *shame* and *humiliation.* Finding that she has made mistakes the previous day, which have now appeared in her in-tray as "voids", Ariel exclaims to herself:

" "Shit! Two more voids with only two days left this week"...She hates voids; they are frustrating and humiliating" (p. 20)

Emotions here play a regulatory role in Ariel's learning, as she anticipates the possible reactions of others on hearing of her mistakes. Her emotions are mixed. She appears to be both angry with herself, irritated by the system, and surprised at having made the mistakes. Fear of failure is a recurring emotion for Ariel. Indeed, this emotion might arguably be seen by her managers as constructive, to the extent that it encourages her to check her work, but counter-productive where it encourages her to apply procedures even to the detriment of her organization as illustrated below:

"She uses a calculation sheet to figure out what the deduction is...choosing the larger amount of the two. It has occurred to her that it would be more advantageous for Alinsu to take the smaller one, but the procedure says to take the larger one." (p. 23)

In the vignette, it is evident that the claims processors are learning to experience a range of emotions within this community of practice, that each emotion is deemed appropriate for a given context, and that this contributes to the learning process. For example, Ariel's *anxiety* not to make mistakes becomes *embarrassment and frustration* when she discovers that some of her processed claims have been returned by the inspectors as "void". However, this embarrassment turns to *relief*, when she shares her feelings firstly with Maureen, the back-up trainer and an old-timer from whom she "gets some comforting grumbling about people in the quality review unit" (p. 21) and then with her supervisor, another old-timer who "shakes her head in solidarity"(p. 21).

As Ariel starts to feel the blame attached to her mistakes dissipating as a result of clear signals from her colleagues, her emotions of *humiliation* become those of *comfort* and *relief* as she experiences the solidarity of her colleagues, thus enabling her once again to concentrate on the work she has ahead of her. Shared learning appears to have taken place, and henceforth Ariel might more accurately anticipate when it is appropriate to feel embarrassment, or when an alternative emotion is more fitting, enabling her to empathize with others experiencing similar feelings of rejection in the future.

Emotion as a Socially Learned Response

Gherardi (1998) has noted that despite the desire to socialise newcomers into a community, experienced members are often reluctant to give away the power associated with their experience and knowledge. The scenario described below provides an example of how collective emotional responses are learned in the Alinsu case, the essential connection between emotion and power relations in organizational learning (Vince, 2001) and the influence of 'emotion talk' (Heelas, 1986) on the shared experience of emotion in the group.

The motivation and loyalty of the claims processors is being put to the test one day when the supervisor warns them that henceforth, long telephone calls will be monitored, since the management suspect that some of them may be giving the "toll-free 800 number to their acquaintances". On receiving this warning, the group start to respond, and a shared feeling of 'hurt' as a result of what is considered by her staff as a breach of trust emerges in the room:

"Harriet senses the tension that her remark has brought to the meeting...there is some grumbling and a few defensive remarks". (p. 25)

By lunch-time this hurt has turned into shared *indignation*:
"And now they are going to monitor long calls! Everyone knows that there are business calls that are long. Beliza reminds everyone of that 45-minute phone call that drove her crazy. Surely "they" will recognise that this is unfair." (p. 29)

As a result of a single statement of managerial intent we now see a major change in the shared emotions felt in the room. The focus is now on the unfairness of the management's attitude. Emotions run high as the group shares its *indignation* and starts to question the nature of their relationship with their managers.

As a newcomer, Ariel and her colleagues are quickly learning that when a lack of trust is displayed, emotions of hurt are deemed appropriate. However, as the group shares this emotion, it strengthens and turns quickly to indignation. This indignation has the potential to be replaced in the longer term by cynicism or resignation.

Emotion as Codified Meaning

In the first example, Ariel's feelings of embarrassment dissipate when she sees that her colleagues are not displaying shock, disappointment or anger but on the contrary are supportive and warm. Her emotions of relief and comfort as she interprets the displays of solidarity and empathy shown by others, prompt her to ascribe new meaning to the situation, and in this case to learn about the membership and collective identity that binds the group as they engage in collective learning (Gherardi,1999). This is an example of Heelas's (1986) "emotion talk" suggesting how people should or should not feel in particular circumstances.

In the second example, the anger mobilised through "emotion talk" by the group members appears to be important in constructing an implicit moral understanding within the community about what is considered right and wrong, and what behaviours are considered acceptable in response. The claims processors' emotional responses of hurt and indignation imply a shared moral code associated with expectations of trust relationships in their workplace. The processors' emotions as a result of the breach of trust subsequently become noticeably stronger, shifting from hurt to indignation. As they share these emotions, they become overlaid with moral justification and meaning, again illustrating Heelas's claim that emotion talk and the moral domain are closely interconnected.

Yanow (1993) suggests that part of organizational learning is about learning the "logic" of the practice. In the vignette, Wenger describes the *embarrassment* experienced by the claims processors in dealing with customers whose claims have been denied, particularly as the claims processors are not privy to the logic behind the decision-making process on which claims calculations were based. Not only are customers often upset at receiving benefits in a seemingly random fashion, but the processors feel ill-equipped to explain how benefits are calculated:

"It's embarrassing when you call and you say, 'Well, I don't know how, but that's how much money you got. Sorry.' I mean it's *embarrassing* not to have the information". (p. 37)

In this extract, the *embarrassment* of the claims processors is laden with meaning. It is about the inequities of the system, their lack of power as a result of lack of knowledge, and the fact that they must handle the customers' claims with insufficient knowledge to give them a satisfactory response. At the same time, the processors must not only learn how to diffuse the emotions of their customers, as well as how to deal with their own embarrassment.

Emotion as Display Rules

Both Gherardi (1999) and Yanow (1993) have echoed Heelas (1986) in suggesting that learning the rules of a professional language game are important within cultures or communities of practice. This includes knowing when emotion display must be controlled, as when Ariel is dealing with a difficult customer. On the morning described in the vignette, Ariel has one such encounter as a direct result of following the correct procedures of her job that require her to withhold some information from a customer in order to protect the privacy of this customer's ex-husband:

"After a long struggle, Ariel put the person on hold, just to take a breath. She was so angry, her body was shaking". (P. 21)

Here Wenger describes some of the physiological symptoms often metaphorically associated with anger. Ariel knows that she is expected to control this anger in her work, hence the need for distancing herself from the customer and giving herself time to achieve composure. It is likely that in observing the behaviours of old-timers she sees that their ability to control emotions of anger are much more developed than hers, and in taking breath she is seeking to

develop this control herself. In order to achieve competency in this practice Ariel must learn the accepted emotion display and language. A public display of anger with the supervisor when she was seen to breach the trust of the clerks was shared and accepted as appropriate behaviour within the community. Ariel's privately experienced anger with the difficult customer was also seen as acceptable, but the norms of the group disallowed these feelings from being showed publicly. These tacit yet crucial feeling rules can be seen here to be serving a number of moral and social functions for the community of practice.

In the vignette, Ariel illustrates her wish to blend into her new work group by dressing appropriately: "She makes up, but discreetly, and dresses cleanly but not aggressively" (p.18) Even in the process of making this decision it is clear that the anticipation of emotions (Rosenberg, 1990) have played a part in her choice, as she imagines the feelings of humiliation or embarrassment that would follow being inappropriately dressed.

Another common theme in the work of the cultural interpretive organizational learning theorists is the idea of gaining membership. Gherardi (1998) stresses that every practice is built upon social processes, and illustrates the tacit nature of the 'situated' curriculum. She describes the process of gaining membership as potentially including rivalry, conflict, jealousy and competition - all situations with the potential to generate emotions. As Ariel's performance improves she begins to experience a sense of pleasure and achievement as she starts to feel part of the group. When she achieves her target, she feels the need to share this sense of pride with her colleagues:" "I already made production," Ariel says triumphantly". The sharing of *pride* as a learned positive display of emotion in response to this situation indicates that Ariel feels that she is starting to gain membership.

The presence of both emotion *display* and *talk* in the community of practice of the claims processors has been demonstrated as being important in the construction of these shared meanings and membership. The analysis of the Wenger vignettes has served to illustrate the value that studies of the micro-social using an anthropological lens to explore emotion can bring to the study of organizational learning. However, it is clear that the significance of these emotions for situated learning and for HRD is still under-researched and needs to be explored further through new empirical research.

Conclusions and Implications for HRD

In the previous section I drew out a range of conflicting emotions shared by Ariel and her colleagues, to illustrate how these emotions appear to be contributing to the learning and creation of meaning within the community. Some of these emotions (fear of failure, embarrassment at receiving "voids" etc., pride, comfort) are acting as controls to compel the members to work towards the company's productivity goals. Others, such as anger, frustration, hurt, and boredom may be counterproductive in terms of productivity, yet are seen to be contributing equally strongly to learning about feeling rules, behavioural norms, acceptable emotional displays, and issues of power control, identity and meaning. Both sets of emotions are equally important for newcomers learning how to become competent in this constantly evolving set of networks which constitute the community of practice. These contribute to learning the logic of the practice, gaining membership, generating collective identity, developing a relationship between the human and non human actors, and generating a common language through conversation.

Given that the Alinsu case takes place in a snapshot in time, however, we are left with a number of important questions for scholars and practitioners of HRD arising from studying the emotions presented in the case. For example, how might the hurt and indignation experienced by Ariel and her colleagues when faced with a challenge to their integrity evolve over time and affect the power relations in this "community"? How might the embarrassment experienced by newcomer Ariel as a result of her lack of competence in the task contribute to the social dynamics of the group, for example by creating a wave of sympathetic feelings or solidarity amongst her colleagues? How might we understand the emotion generated by the power of the computer system in the work lives of the processors, and their preference not to look beyond their experience of the system to discover the managers, programmers, accountants, technologies etc. all of which have contributed to developing the behaviours of the system which drives their work? How might future changes to the structure, technology, group membership, or task affect the group emotionally, and consequently the learning in the community? How might unexpected events generate emotional responses that change what is considered by the group to constitute competence and full membership?

I have contended in this paper that emotion talk and emotion display are both essential components of organizational learning, and that the ways that organizational members construct and communicate emotion will influence not only their understanding of the activities in which they are engaged, but also the practices they adopt, the goals they set, and the identities that give meaning to their work. Emotion research in organizational learning to inform the scholarship and practice of HRD will therefore, following Harré's (1986) anthropological studies into the social construction of emotion, need to refocus on the language games and narrative forms available in a culture or

community of practice; the moral order which controls the meaning and use of emotional terminologies; the social functions that emotion displays and talk perform in the dramaturgical episodes of that culture or COP; the rules which determine how emotion and action take place, and the role played by emotion in organizational power relations and identity shaping.

The interpretive-cultural approach to studying organizational learning has greatly altered and illuminated the conceptualisation of organizational learning. At the same time, the study of emotion in organizations has been greatly enriched by the social constructionist ideas of anthropologists following Harre. A fuller understanding of how emotion talk affects the moral order and power relations inside organizations and consequently the social elements of learning is now needed by the HRD community in order to inform the design of effective organizational interventions.

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