# A LITERATURE REVIEW ON ORGANIZATIONAL FORGETTING

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#### **Abstract:**

The aim of this study was to clarify the concept of organizational forgetting by reviewing the related literature. First, the study will focus on the concept of forgetting in general. Then, the related concepts will be clarified and the concept of organizational forgetting will be explained. Future directions that researchers in this field may focus on will be stated and finally, the conclusions of the study will be made. This and similar studies are of importance since the concept of organizational forgetting has been eclipsed by the more popular concept of organizational learning.

**Keyword:** Organizational forgetting, organizational learning, avoiding bad habits, failure to capture, memory decay, unlearning.

Clasificare JEL: M11, M12, M15

#### 1. Introduction

One of the most popular concepts in management and organization studies is organizational learning. Many scientific journals (e.g. "The Learning Organization", "E-Journal of Organizational Learning and Leadership") or special editions of journals (e.g. "Organization Science, 1991, 1/2", "International Journal of Technology Management, 1996, 11(7/8)") are published on this subject. In a similar vein, many conferences (e.g. "Organizational Learning, Knowledge and Capabilities") are held on this topic every year all around the world. This importance largely stems from the positive results that organizational learning may create for organizations, such as a competitive advantage, efficiency, effectiveness etc. However, a complementary concept of organizational learning is organizational forgetting, although researchers seem to treat organizational forgetting like a step-child (Akgün et al., 2007; Becker et al., 2006; Besanko et al., 2010; Fenandez & Sune, 2009a; Fernandez et al., 2012).

The main aim of this study was to clarify the concept of organizational forgetting. Although there are some very valuable studies in literature, there also still seem to be many points of ambiguity. Furthermore, to the best of our knowledge there has been no literature review in the field. With the help of this literature review, the researcher endeavors to make the concept clear and to draw attention to the importance of organizational forgetting.

# 2. The Concept of Forgetting and Interests of Various Disciplines

The concept of forgetting is defined in various ways. For example, according to a definition of the Turkish Language Association (Türk Dil Kurumu-TDK), forgetting means "to not remember". According to another definition, forgetting is related to "coming to a situation in which one person cannot do a related thing" (TDK, 2016). As can be seen, the first definition adopts a cognitive stance to a large extent, while the second seems to have a more behavioral one. If seeking a common point for these two different definitions, it can be observed clearly that both seem to approach the concept from a negative aspect.

Many disciplines are interested in the concept of forgetting, such as philosophy and economics as well as management and organization studies. For example, Plato, Nietzsche, Ricoeur and other many philosophers were curious about how humans learn and forget (Martin de Holan, 2011a). At the same time, some attributed a negative meaning to forgetting. For example, forgetting is a human predicament according to Plato (Ramadanovic, 2001), although others associated forgetting with a positive situation. For example, for Nietzsche, active forgetting or selective remembering is a desirable situation for humans since not all past experiences and knowledge are beneficial for them. This positive approach can be observed in Ecce Homo in particular (Nietzsche, 2014).

There are many studies in the literature of economics that focus on the concept of forgetting, such as Benkard (2000), Besanko et al (2010) and David and Brachet (2011). For example, David and Brachet (2011) investigated the antecedents of organizational forgetting in the context of trauma-related ambulance runs in Mississippi between 1991 and 2005. They found that skill decay and turnover were important antecedents of organizational forgetting, with turnover at twice the magnitude of skill decay.

# 3. The Concepts Related to Organizational Forgetting

At this point, clarification of some related concepts such as organization, organizational knowledge, organizational memory and organizational learning would be useful for better understanding of organizational forgetting.

An 'organisation' can be defined in many different ways. For example, according to Daft (1998: 11), "organizations are social entities that are goal-directed, are designed as deliberately structured and co-ordinated activity systems, and are linked to the external environment". In a similar vein, according to another definition, "organizations are entities in which individuals coordinate their actions to achieve specific goals" (Cuncliffe, 2008: 4). However, according to a more "knowledge-based perspective", *organizations* are knowledge repositories that retain knowledge in their assets, routines, rules and standard operating procedures (Martin de Holan & Phillips, 2004a).

In addition, *organizational knowledge* is a result of the organizational learning process. Organizational knowledge does not refer to knowledge in the mind of a member of the organization. It should be independent of individual members of an organization (Martin de Holan & Phillips, 2004a). Although there are many repositories, a previous study has professed that the structure of organizations is one of the key repositories of organizational knowledge (Rao & Argote, 2006). Finally, organizational knowledge can be classified in different ways. One of the most common classifications of organizational knowledge is explicit/tacit. In addition, Evans and

Easterby-Smith (2006) categorized organizational knowledge under three groups, as "systemic", "strategic" and "socio-political".

Another concept that plays a central role in theories of organizational learning and forgetting is organizational memory (Casey & Olivera, 2011). To understand organizational forgetting, a clear understanding is necessary of where organizational knowledge is retained (Rao & Argote, 2006). *Organizational memory* is a set of tools and mechanisms that collect, store and recall knowledge and experiences of organizations (Casey & Olivera, 2011; Martin de Holan & Phillips, 2004a). Organizational memories not only record the past of organizations but also shape the future of organizations (Lewitt & March, 1988). While Walsh and Ungson (1991) in one of the primary studies in the field of organizational memory, conceptualized organizational memory as a static element to a large extent, later studies stated that organizational memory has a dynamic nature based on the interactions of organizational members.

Finally, *organizational learning* can be described as "the ways in which firms build, supplement and organize knowledge and routines around their activities and within their cultures, and adapt and develop organizational efficiency by improving the use of the broad skills of their workforces" (Dodgson, 1993: 377). Although some different streams of learning are sometimes mentioned such as "affective learning" or "neurophysiological basis of learning" (Seymen & Bolat, 2002), there are two main traditions in organizational learning literature. The first is the behavioral view, that learning is viewed as a systematic change in standard operating procedures, assets, rules and routines. The second is the cognitive view, which conceptualizes learning as a change in cognitions, frames of reference, cognitive maps and shared mental models of the members of organizations (Akgün *et al.*, 2007). The cognitive view focuses on changes in cultures and sense making tools of organizations, while it tends to ignore the social and cultural elements of the organizational learning process (Akgün *et al.*, 2003). Although there are some differences in these two views of organizational learning, both emphasize the knowledge base of organizations (Martin de Holan & Phillips, 2004a).

# 4. The Concept of Organizational Forgetting

Knowledge management and organizational knowledge literature largely tend to focus on organizational learning. Therefore, it is fair to say that the phenomenon of organizational forgetting has not been completely understood (Martin de Holan *et al.*, 2004). However, this does not mean that organizational forgetting has been completely ignored. Some studies (eg, Carlson & Rowe, 1976; Nystrom & Starbuck, 1984) may be accepted as starting points for this literature (Martin de Holan, 2011b). This first generation of organizational forgetting studies largely focused on the fields of operation management and organization theory. On the other hand, a part of this literature largely conceptualizes organizational forgetting as an undesirable situation. For example, Smunt and Morton (1985) claim that organizational forgetting has negative effects on product quality and the production capacity of an organization. Another part of literature views organizational forgetting as a secondary subject. However, a stream that began particularly with the studies of Martin de Holan et al discusses the view that forgetting may also have positive results for organizations. In this school of thought, organizations may need to forget to be able to learn new things and change (Akgün *et al.*, 2007) and survive (Nystrom & Starbuck, 1984).

Martin de Holan and Phillips (2004a: 1606) define *organizational forgetting* as "the loss, voluntary or otherwise, of organizational knowledge". Many studies have shown that appropriate

learning can provide a competitive advantage to organizations. Since forgetting is needed to learn new things, forgetting is just as important as learning in organizations. Therefore, competitiveness is associated with learning (and forgetting) the right things at the right time (Akgün *et al.*, 2007; Lei *et al.*, 1999; Martin de Holan & Phillips, 2004b).

The harm caused by some organizational forgetting has been extensively discussed in literature. For example, Argote (2013) discusses that organizational forgetting may cause an obstacle to reaching the expected levels of productivity in production settings. Organizational forgetting may also have benefits for organizations. The current cost of the management of knowledge for organizations is increasing rapidly. Therefore, separating the wanted from unwanted knowledge will decrease these costs for organizations. In a similar vein, one of the most important factors for successful mergers and acquisitions is congruent values and behaviors of the different sides. At this point, the participating organizations can increase the performance of mergers and acquisitions by forgetting conflicted elements. In addition, some innovations may be illegitimate or they may not show the performance that is expected from them (Casey & Olivera, 2011). Therefore, discarding this knowledge may be beneficial for organizations (Martin de Holan & Phillips, 2004b).

Forgetting in organizational contexts has different forms. For example, Martin de Holan et al conducted field research in Cuba on the personnel of seven international hotels between 1995 and 1999. As a result of that research, they created a typology about organizational forgetting, according to which the forms of organizational forgetting can be specified in terms of two dimensions, as "sources of knowledge" and "mode of forgetting" (Martin de Holan *et al.*, 2004). These different forms of organizational forgetting are presented in Figure 1. These are certainly not the only forms. For example, Fernandez and Sune (2009a) showed that organizational forgetting can be organized in terms of two dimensions of intentional/unintentional and codified/non-codified. Similarly, in Azmi (2008)'s typology of unlearning, there are two axes of positive/negative and planned/unplanned. In the current study, classification will be based on the forms described by Martin de Holan *et al.* (2004).

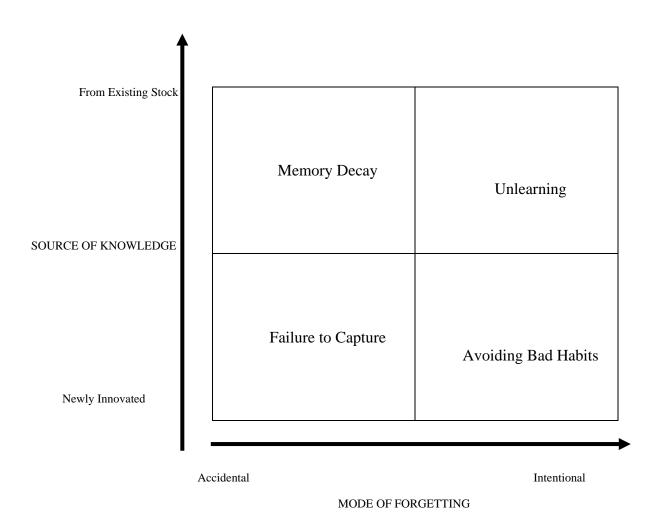


Figure 1: Forms of Organizational Forgetting

Source: Martin de Holan et al. (2004: 47).

"Memory Decay" in Figure 1 represents an accidental forgetting of embedded knowledge in organizations. There may be various reasons behind this phenomenon. Organizations may forget their rules, values, methods etc. when key personnel leave the organization or if they do not use these rules, values and methods regularly. For example, an organization may forget a critical production technique that it has used for years if key personnel responsible for production leave the organization. As a second example, a pastry shop may learn to prepare a new cake. However, it may not take an order for this cake for a long time and thus the personnel may forget how this cake was made. To prevent this situation, organizations may charge a person with identification and protection of critical knowledge stock (Martin de Holan *et al.*, 2004).

Another form of accidental organizational forgetting is "Failure to Capture". This refers to failed association of new knowledge to organizational memory. This type of forgetting may

stem from adjourning teams or high turnover rates in a related organization. Organizations may follow two interconnected strategies to solve this problem. The first one, *knowledge articulation*, means transformation of new knowledge into a more explicit one. *Knowledge institutionalization* is the transmission of knowledge to the other units of an organization to make it embedded. These first two forms of organizational forgetting are unintentional (Martin de Holan *et al.*, 2004). There may be some factors that make forgetting difficult. These factors may be some precautions that are taken by organizations. In addition, these may be related to the nature of the knowledge. For example, according to Madsen and Desai (2010), knowledge that is learned after some failures is forgotten more slowly.

Unlearning is often used as a synonym for organizational forgetting. "Unlearning" means "discarding of old routines to make way for new ones" (Tsang, 2008: 7). In unlearning, organizations remove their embedded knowledge intentionally. During unlearning, embedded knowledge is disorganized by breaking routines, changing structures etc. Therefore, organizational forgetting is a more extensive concept than unlearning since organizational forgetting includes both loss of knowledge voluntarily or involuntarily. On the other hand, unlearning is associated with intentional efforts of forgetting (Easterby-Smith & Lyles, 2011; Martin de Holan et al., 2004). As an example of unlearning, Zahra et al. (2011) discussed the entrance behaviors of multinational companies of emerging economies such as Brazil, China, Egypt and India. It was stated that these companies should unlearn some behaviors that they use in domestic markets to be successful internationally. Finally, unlearning is not an easy process as some factors such as communication bottlenecks, fragmented structures, and self-interest may hinder organizational unlearning (Nicolini & Menzar, 1995).

In addition, organizations not only learn good things but also bad things. "Avoiding Bad Habits" refers to the intentional forgetting of relatively new knowledge of the organization. Successful organizations are those which forget unwanted knowledge before this knowledge becomes embedded (Martin de Holan et al., 2004). For example, the top management of an organization may understand that a new managerial innovation may be harmful for the organization and discard it rapidly. In keeping with this idea, Mariano and Casey (2015) discussed that some new innovations that are inconsistent with old systems can be detrimental for organizations.

According to Martin de Holan and Phillips (2004b), the last two forms of organizational forgetting are more related to the concept of strategy since they include an emphasis on the will of the organization. As a natural result of this situation, these forms strongly need the agency of top management (Martin de Holan, 2011b). In addition, organizations may use some tactics such as organizational development, job rotation, removing top managers from the organization and adopting management fads and fashions to develop their capabilities of forgetting. For example, there is a built-in obsolescence in most managerial fads and fashions (Easterby-Smith & Lyles, 2011; Nystrom & Starbuck, 1984). In harmony with this idea, Abrahamson (1996) emphasizes the relatively transitory nature of management fashions. Therefore, these managerial fads and fashions can create a capability for organizations to forget (Easterby-Smith & Lyles, 2011). On the other hand, organizations should use these tactics carefully since they may create some counterproductive results. For example, making some changes in the top management of an organization may affect the morale of the organization (Nicolini & Meznar, 1995). At this point, how can a decision be made as to whether forgetting is intentional or unintentional. Fernandez and Sune

(2009a) recommend two criteria to decide about the type of forgetting. These are the existence of an agency and a clear decision-making process about forgetting.

## **5. Future Directions**

Organizational forgetting is a quite important concept. As emphasized before, organizations that particularly operate in more dynamic environments have to learn forgetting to be able to survive. Despite this situation, organizational forgetting has not attracted much attention from researchers. This partially stems from difficulties in the conceptualization and implementation of forgetting (Akgün *et al.*, 2007). Therefore, providing clarity about the nature of organizational forgetting (Tsang & Zahra, 2008) and making organizational forgetting measurable is of great importance.

The second and possibly the most general recommendation is related to empirical studies in the field. Although the field is not so new, when the literature of organizational forgetting is examined, it can be clearly observed that there are only a few empirical studies in the literature (Fernandez *et al.*, 2012; Tsang, 2008; Tsang & Zahra, 2008). Therefore, researchers should be encouraged to conduct empirical studies. In addition, longitudinal research on the subject will be very interesting (Akgün *et al.*, 2007).

In addition, these few empirical studies have focused on various sectors such as aircraft production (e.g. Benkard, 2000), auditing (Causholli, 2016), construction industry (Cegarra-Navarro *et al.*, 2012), global orbital launch vehicle, health (David & Brachet, 2011), higher education (Eryılmaz, 2015; Fernandez & Sune, 2009a, 2009b) and tourism (Martin de Holan and Phillips, 2004a, 2004b). Extending the research to other sectors should provide both interesting and beneficial data. Research in sectors where results are critical and costly will be more appropriate to clarify the costs and benefits of organizational forgetting.

A fourth recommendation is about strategic alliances. Strategic alliances have become a strong trend in the global economy (Elmuti & Kathawala, 2001), one possible reason for which is the opportunity for learning from partners in strategic alliances (Ghosh, 2004; Inkpen & Tsang, 2007). It is fair to say that literature on learning among organizations in strategic alliances is only just emerging. However, the literature of organizational forgetting seems to be very silent about forgetting in strategic alliances or among a group of organizations. For example, Greve (1995) found that contagion may be a cause of strategy abandonment. The next generation of studies in the field may focus on questions such as how can a group of organizations (a strategic alliance) forget and what tools and methods are used for this.

One of the relatively new research points in the field of organizational learning is power and politics (Easterby-Smith *et al.*, 2000). However, this missing point has been filled by some studies (e.g. Blackler & McDonald, 2000; Coopey & Burgoyne, 2000; Lawrence *et al.*, 2005). Although power is one of the mechanisms to provide organizational forgetting (Martin de Holan, 2011b), power and politics have not so far attracted great attention from researchers in the field. Therefore, researchers who are considering focusing on this field in the near future may investigate the relationships between organizational forgetting and power/politics.

Another mechanism for organizational forgetting is discourse (Martin de Holan, 2011b) and/or rhetoric, which is "the ability of 'seeing' the available means of persuasion" according to Aristotle (1991: 13). To persuade others, the three different types of persuasion strategy of Logos, Pathos and Ethos can be used. In Logos, the orator obtains benefit from science and numbers to persuade others. In Pathos, a qualified orator recognizes the emotions of the receiver during the

communication process and shapes the conversation in terms of these feelings. Finally, Ethos is related to the traditions and generally accepted values of a society and the orator takes support from these to persuade the receiver (Green, 2004; Green *et al.*, 2008). These rhetorical strategies are often used together in practice. It can be said that there is rhetoric in the essence of life and therefore it is also important in the context of organizational forgetting. Questions which may be investigated include 'Which rhetorical strategies are used by agents?' and 'Under which conditions do rhetoric strategies change?'.

#### 6. Conclusion

In conclusion, organizational forgetting is a very important concept and a complementary concept to organizational learning in knowledge management. Learning, forgetting and relearning are steps of a process that is continuous and ongoing (Azmi, 2008). In spite of this truth, the organizational forgetting side of this process has not attracted much attention from researchers and the concept has remained ambiguous to a large extent. Therefore, the aim of this study was to clarify the subject as much as possible by reviewing the related literature and to draw the attention of academicians and practitioners to the importance of organizational forgetting. As in every study, this paper has some limitations. Despite the attempts of the researcher to access all articles on the subject, there were many important papers in literature that were not accessible to the researcher.

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