



# THE STRATEGIC USE OF STORIES

by Terrence Gargiulo

**S**tories are fundamental to the way we communicate, learn, and think. They are the most efficient way of storing, retrieving, and conveying information. Because hearing stories requires active participation on the part of the listener, stories are the most profound social form of human interaction, communication, and learning.

Telling stories scratches the surface. Through my research and consulting I have learned how to use stories as powerful vehicles for eliciting people's experiences and knowledge, helping people to hear others and themselves in deeper ways to promote reflection and learning in organizations.

In lieu of an imprecise and debatable definition of stories, Figure 1 on page 28 proposes a framework of nine functions. These functions have unique effects that are applicable to performance interventions involving organizational communication and learning.

## Organizational Communication

What are the various forms of communication in organizations? If we were to build a matrix of the major targets of communication and the channels through which they move, we would end up with a two-dimensional array of 12 communication areas (see Figure 2 on page 28).

The largest percentage of our efforts focuses on areas 1-6. These are clearly identified channels and targets that use standard tools and process that organizations have used for some time. By and large, organizations are good at moving information through these channels. This leaves potentially 50% of organizational communication untapped and unmanaged. In this framework, anything that is a non-specific target or that moves through the personal channel tends to be ignored.

Internal, external, and partner targets are considered self-explanatory. Formal channels are "official" pathways through which we communicate, and social channels carry beliefs, attitudes, and values (i.e., vision and mission statements). Let's take a moment and define non-specific targets and the personal channel of communication.

Stories function in the following ways:		Stories have the following unique effects:
Empower a speaker	➔	Entertain
Create an environment		Create trust and openness between colleagues
Bind and bond individuals		Elicit stories from others
Require active listening	➔	Listen actively to— Understand context and perspective Find the critical point in a system Uncover resistance and hidden agendas
Negotiate differences		Shift perspectives to— See each other Experience empathy Enter new frames of reference
Encode information		Hold diverse points of view
Act as tools for thinking		Become aware of operating biases and values
Weapons		Create a working metaphor to illuminate an opinion, rationale, vision, or decision
Medicine for healing		Establish connections between different ideas and concepts to support an opinion or decision
		Think outside the box to generate creative solutions and breakthroughs

**Figure 1. Framework for Defining Stories.**

Untapped Areas of Communication		Target			
		Internal	External	Partner	Non-Specific
Channel	Formal	1	2	3	10
	Social	4	5	6	11
	Personal	7	8	9	12

Organizations can use stories to reach untapped areas 7-12.

**Figure 2. Array of 12 Communication Areas.**

### Non-specific Target

Non-specific communications are informal messages and communications that occur without an organization's knowledge and have no specific target. They simply happen. Think of these communications as "word of mouth." These messages spread like a forest fire burning out of control. Once a broadcast has been made, it keeps traveling. We can't avoid it; all our targeted and non-targeted broadcasts are out there.

The nature of our organizational broadcasts is not so different from a movie. We have no idea which way communications will bounce back to us or in what form. Consequently, we don't expend any strategic time or energy determining how to leverage them. Ironically, more than any other deliberate efforts, it is this background noise found in non-specific targets that acts as artifacts of our purposeful communications with all the other targets that impact our organization's perceptions in the eyes of others.

### Personal Channel

Personal channels carry the largest and most dynamic load of all the channels. These are the people-to-people connections. Whatever may have been purposefully broadcast through formal or social channels morphs and takes on a life of its own in personal channels. People will digest and assimilate messages from the other two channels, but they will spin out their own interpretations of the same information through their informal interactions with others. Frequently there will be incongruence between information broadcast through a formal channel and information found in a personal channel.

Information found in personal channels almost always overrides any other information. Similar to non-specific targets, communications occurring in this channel are difficult to tap into and even more difficult to

manage, yet they are the most critical of all the channels. Combined, non-specific targets and personal channels are the two most important forms of communication that organizations and Human Performance Technology (HPT) professionals need to address.

## Untapped Matrix Combinations and the Role of Stories

The following approaches will help incorporate untapped areas of the matrix into an organization's communication strategy.

### Personal/Internal—Area 7

Of all the areas on the communication matrix, this is the easiest one to influence. There are plenty of opportunities to intercept these messages. As professionals, we need to be as observant of how people act as much as we tune into what they are saying. Actions do speak louder than words, and carefully crafted words are never as telling as a narrative selected and relived by a teller. We need to look at what stories a person chooses to tell. Much about that person's motivation and intentions can be deduced from the stories told and the way they are told.

There is a powerful reciprocal climate of trust engendered by the dynamics of sharing personal stories. Once they are set in motion we do not need to go out of our way to fabricate opportunities for people to share personal stories. People within the organization will willingly and randomly share their experiences and insights in the form of stories. An organization's culture must foster a receptive environment that encourages people to freely share this way. How many times have you attended a weekly meeting where there is some sort of standing agenda item for people to discuss their experiences? Short of a gripe session, this rote standard practice yields little information and receives little respect from the individuals involved. Although these meeting rituals are well intentioned, they fall short of achieving any significant success.

Informal communications can be saturated with stories of the day and with incessant probing. Pushing out "key stories of the day" results in short shelf lives for these communiqués. Using intranets and daily news or other such tools to broadcast stories aligned with key business objectives has value, but the range of these broadcasts is weak and shallow. What we want to be able to do as analysts and solution providers is uncover stories while walking the beat and incite others to share them. The puller of stories facilitates the teller to realize that his or her story is an invaluable nugget that has a relationship to the efforts of other people in the organization and the business imperatives of the day. The teller becomes a "signal repeater." Suddenly realizing the value of his or her message, the teller takes the story

and, without any prompting, repeats and rebroadcasts the message throughout the organization.

That's not even the real value. When there are lots of mini broadcasts, the number of total broadcasts increases. In other words, when a story is shared, it is more than likely to trigger someone else's recollection and result in a fresh story. Now each repeater carries not only the original story but also a story of his or her own. Even if the signal of the first story drops somewhere along the way, the new story carries its own energy.

Here is an image to clarify this concept. Imagine throwing rocks into water. Toss one rock in a glassy body of water and watch the concentric circles move away from the source. As the circles get larger and begin to weaken, imagine throwing in another rock close, but slightly removed, from the first source. Now you have multiple waves of concentric circles. The new waves are stronger and will cancel out the weakening waves before them. If the waves coincide exactly with one another, the force of the wave will be reinforced. Either scenario leads to a strengthened signal.

In this analogy, our first communication functions as the initiating force. All the other rocks tossed into the water that create new waves are like employees who rebroadcast the message. There is far less effort and more reflective insight involved, and it is a much more economical way of transmitting information. The economy stems from the fact that we do not need to create perfect communications and then clog overfilled official channels with additional information. Pushing out a message to pull out new information in the form of stories, and then pushing this communication deeper inside the organization, is known as a "push-to-pull-to-push" strategy.

HPT professionals can help leaders and managers spend less time writing memos and emails and more time developing quality relationships with their employees through the use of stories. Stories are one of the best ways to develop relationships. Knowing what questions to ask in this relationship is important. It requires a leader or manager to focus on the communications that will move people closer to achieving the organization's objectives. By doing this, the manager is continually directing and redirecting his or her attention to look for gaps in people's understanding. When there is confusion, employees get stuck and lose momentum, which creates negative energy. A high degree of mindfulness mixed with a sharp analytical mind serves professionals, leaders, and managers best.

While not every instance of misperception floating around the organization can be reframed, the ones capable of inflicting the most damage can be effectively addressed in quick order. Knowing what questions to ask is also important, because it involves the interaction between the potential

storyteller and the elicitor. Pacing, thinking quickly, changing tack, entering different frames of reference, sharing personal experiences, and using evocative language are some of the skills required to be a successful elicitor. Discovering a story is only half the challenge. Next the elicitor must guide the storyteller to recognize the importance of the story and inspire him or her to retell it.

### **Personal/External and Personal/Partner—Areas 8 and 9**

Areas 8 and 9 of the communication matrix operate under the same principles as the area of personal/internal communication discussed above. Although the targets differ, the same strategy of “push-to-pull-to-push” can be applied. As we move further from the organization, it becomes increasingly important to cultivate strong allies. Depending on our business, it can be more difficult communicating with the external, partner, or non-specific targets described in the communication matrix. Direct contact with them may be lacking so that others become our eyes and ears. From inside the organization, HPT professionals must develop allies and then act as coaches to model and mold the story and elicit behaviors required for a successful “push-to-pull-to-push” strategy. Once allies or diplomats are cultivated and coached, they can also help determine areas of confusion and what communications are necessary to mitigate the confusion.

Traditionally, communications operate from the top down. The people in the know decide what information is important and what information they want to share. Although it is not possible or advisable to share everything, communications must be based on the needs and priorities of the desired targets, not solely on the vague impressions of a few people. Use the “push-to-pull-to-push” strategy, stories, and internal diplomats to start communications from the bottom up. By doing this, all the mini broadcasts stand a good chance of addressing most of the targets’ communication needs.

I like the image of our immune system with its army of white blood cells. Lots of little healers go to work to reach all the infected parts of the body. The body’s success lies in its immune memory and decentralized plan of attack. We can put the same strategy to work with our organizational communications.

### **Formal/Non-specific—Area 10**

Surveys and focus groups are the principal way organizations reach the formal/non-specific areas of the communication matrix. The tools and strategies employed tend to be very limiting in nature. Professionals need to move past numerical rating systems and other forms of constrained feedback. Have you ever sat in a focus group and felt like the questions being asked weren’t the right ones in the first place? Sometimes the

questions are self-serving. Or they may be worded in such a way that they do not solicit genuine feedback. It is important to guard against measuring what we want to measure or biasing respondents to give the answers we desire.

How do we get organizations to accept qualitative as well as quantitative data? And how do we process qualitative information? We do not want to over-react to outliers. There is a tendency to assume that single qualitative data points such as stories can be abused. We do not want to create new policies or practices based on such limited information. At least statistics can be validated. Stories can make us uncomfortable. What if they are not true?

Consider the number of customer interactions that can be used as opportunities to ask people to share stories in the form of personal narratives. Today, technology gives us a number of new touch points such as websites, email, and instant messaging. Flowery testimonials in marketing brochures are common, but most of these come in the form of random communications pushed to us by customers or through solicited comments. We need to pull these forms of communications. What if we trained all employees, especially customer service representatives, to elicit and collect stories from our customers? HPT professionals would then need to provide mechanisms for them to share the stories they gather and would need to help organizations become adept at garnering insights from them. Some of this qualitative data would come in the form of observations. Employees would be keyed into becoming more aware and reflective of stories happening around them, not just stories told to them. These stories would be then presented in management meetings, where numbers and canned reports typically occupy the largest percentage of time.

Decision makers would also need to be trained in how to work with stories. Qualitative trend analysis, pattern recognition, and clear identification of decision-making objectives coupled with a high degree of self-awareness and honesty on the part of anyone working with this qualitative information will yield amazing results. For example, through stories I have helped groups work through difficult decisions, discover the root cause of problems, engage in creative problem solving, and reach consensus in a fraction of the time it normally takes. You may be questioning the relevancy of stories and the likelihood of finding trustworthy employees who either have these competencies or who you believe can develop them. However, I have been surprised by people’s innate capacities in these areas. Yet for this to be achieved, there are a number of competencies that would need to be developed in employees and managers.

### **Social Non-specific—Area 11**

This area of the matrix deals with collective experience. When two or more people randomly discuss an organization,

what do they say? What are their experiences? How is their collective experience different from their individual ones? How are they influenced by each other's stories? We are trying to understand the combinations resulting from the mixing of people's perceptions. This is the rumor mill. When we tap into this area of the communication matrix, we are not as concerned with the validity of people's affectations as we are with how our organization is represented in their social interactions. If our organization were mentioned in the same conversation as a competitor, how would we stack up?

"What-if" scenarios are an effective way of predicting how people will communicate to others about their perceptions of organizations. A what-if scenario involves presenting people with a situation and asking them to imagine how they would respond or react. A well-designed focus group using story methodologies can capture this information. Think of story methodologies as techniques for eliciting stories. Once again, underlying competencies need to be developed for someone to be effective at eliciting these stories. The same story methodologies employed in a focus group can be used by anyone who interacts with knowledgeable organizational members. These what-if scenarios also leave people with the impression that you want to hear from them and that you care about how they feel. People tend to like the chance to explore alternatives. Furthermore, people like being asked to be an advisor. It provides a sense of importance. HPT professionals can train employees how to extemporaneously construct what-if scenarios and how to interpret the information they collect.

Depending on the organization, it is also possible to train employees to develop keen powers of observation, especially with customer behaviors and interactions. The danger lies in someone over-reacting to a situation. Employees and professionals need to discover how to see things in relationship to one another and not as solitary events. For instance, one upset customer complaining to another may not be a sign of some larger looming problem. In all likelihood, it is one customer's experience. In customer services situations, a well-timed and sincerely executed interaction becomes a golden opportunity to shift negative perceptions and leave people with a powerful story. There are many exceptional customer service stories to tell about someone who went the extra mile. These stories result in at least short-term and often long-term customer loyalty. A careful audit of business processes that involve key customer interactions will help an organization tune into people's perceptions and improve how they guide customer communications in desired directions.

### Personal/Non-specific—Area 12

This area of the communication matrix deals with personal representations. Individuals are members of social constructs. When plugged into a social network, they bring their stories and perceptions. Remember playing with bat-

teries and light bulbs in science class? When you connect lights in series, each bulb gets progressively dimmer. When you connect lights in parallel, they are much brighter. Professionals have to find a way to prevent important communications from becoming diluted as people move further and further from the original source of information. This is equivalent to light bulbs connected in series. Lots of different people are needed to operate in the personal channel and carry key communications to non-specific targets. As others encounter these messengers, they become like light bulbs connected in parallel because they are closer to the information source.

This area of the communication matrix is the hardest to visualize. It is also extremely difficult to picture how to reach these solitary, distant points of perception. How can professionals justify an ongoing effort to reach them when there is no guarantee of measuring efforts?

This requires a leap of faith. A company must be committed to an ongoing effort that will be difficult to measure. Consider the effects of corporate goodwill. We know it is important and we acknowledge that there are other intangibles that play a part in determining our organization's success, yet we would be hard pressed to measure them. This goes beyond obvious gestures of corporate goodwill such as philanthropic cash donations. What about those individuals who donate their time to the community with their organizations' support? People on the outside observing these good works are likely to associate the good works with the employees' organization, thereby resulting in a positive perception of the organization. It is difficult to place a meaningful price tag on that.

### Competency Map

After conducting an initial round of interviews and surveys with six *Fortune* 500 companies and one nonprofit organization, the competency map shown in Figure 3 was developed. Table 1 on page 32 is a summary of the major themes from the interviews and how they relate to the competency map.

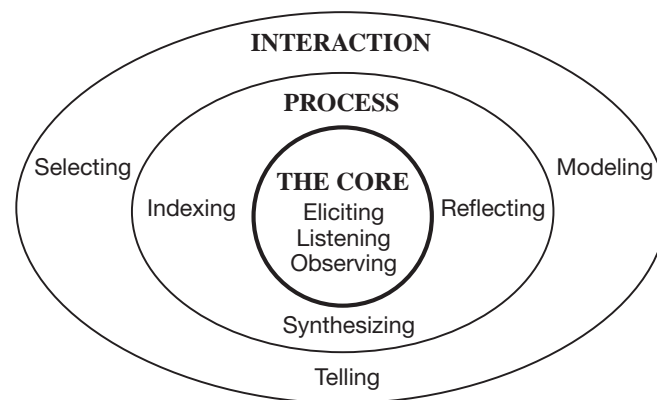


Figure 3. Competency Map.

The rings shown in Figure 3 represent three levels of personal story competencies related to communicating and learning. Each ring consists of three competencies. Table 2 is a summary.

The outermost ring of interaction characterizes the competencies used to engage with the external world. Many people mistakenly assume that using stories well requires

little besides knowing what stories to select and being good at telling them. Although these are useful competencies, they are superficial in comparison to the others. We can communicate more by eliciting stories than by telling them.

The second ring of the competency map is the process ring. It is characterized by the things that we do internally, when we are conscious of our stories and the stories around us. It is

hard to discuss the three competencies in this ring in any causal order because these internal processes of indexing, synthesizing, and reflecting happen most of the time in parallel. The reflection competency is the discipline developed when one stops to notice stories. To paraphrase a Greek philosopher, "An unexamined story is not worth having." While gathering new insights from our own stories, a highly developed capacity for reflection makes us more mindful of others. Reflection gives us a chance to behave proactively and to continually revise our perceptual filters.

The third ring of the competency map is the core. It contains the central competencies that are at the heart of using stories effectively as a communicator or learner. All the competencies found in the other rings build from the central ones of eliciting, listening, and observing. Listening is the common thread to the three competencies in the core. For example, eliciting stories from others demands sensitivity and attentiveness to the stories around us. Drawing stories out of others requires astute observation skills. Watching for cues in words and actions can help determine what questions to ask or what stories to tell in order to stimulate others' story telling. We must be equally aware of our own thought processes. Listening ties this together and involves more than hearing. As we gather information, listening engages our imaginations. What we hear is fused with our experiences. The new information commingles with the old to become more relevant and immediate.

INTERVIEW THEMES	COMPETENCY
Stories can clarify a subject being discussed.	Modeling
Sharing personal stories brings people closer together, establishes connections among members of a group, and makes a group more effective.	Selecting
A masterful storyteller creates a space for the story, which encourages listeners to go along with them.	Telling
Stories need to play a central role in retrospective project debriefs because they facilitate dialogue and because they can be carried forward as a valuable resource for later projects.	Reflecting
Making room for personal and organizational reflection is a key to leveraging the power of stories.	Reflecting
The length of a story needs to be adjusted for the context in which it is being told.	Telling
After action reviews, provide a structured opportunity for reflection and storytelling.	Eliciting/Synthesizing
For stories to work in meetings, people need to trust one another, be skilled in interpersonal communications, and know how to ask the right questions.	Listening/Observing
In training, people learn the most from dialogue among themselves and with the instructor.	Synthesizing
There is an integral relationship between stories and reflection.	Reflecting
Stories from our personal lives can be effectively used at work.	Indexing
Analogies are stories that help people see things in a different way that may have more meaning for them and that gives them something to hang onto.	Modeling
Stories have more impact than any other mode of communication.	Telling
Important messages need to be communicated in stories.	Selecting
Stories have intentionality. The teller has a reason for sharing it and hopes to lead his or her listeners in a direction.	Selecting
Storytelling is a two-way street. Listening to stories gives you the context for what another person is trying to communicate.	Eliciting/Listening
The critical role of context in communication establishes a common ground between those who are communicating so that they are focused and directed toward the same thing.	Observing
Stories create a sense of comfort between people, which opens up all kinds of possibilities.	Eliciting
Storytelling can be as simple as saying the right word at the right time, which can produce a rich set of associations.	Modeling
Finding stories requires introspection and reflection.	Reflecting
Stories help us find the message we want to share and make it relevant for our listeners.	Indexing
Stories allow us to communicate more directly.	Eliciting
Stories we tell should be a part of us.	Indexing/Selecting
Stories connect us to the moment.	Listening/Observing
Business leaders who acknowledge the importance of each person both for the role he or she plays in business and for who he or she is will be the most successful.	Modeling

**Table 1. Major Themes from *Fortune* 500 Interviews and Surveys.**

<b>RING</b>	<b>COMPETENCY</b>	<b>DESCRIPTION</b>
<b>INTERACTION</b>  Describes how we use stories to connect with others and communicate	Modeling	Being aware of one's actions and using them to create lasting impressions in the eyes of others; employing a variety of analogical techniques to bring an idea or concept alive
	Telling	Relating a story with authenticity that paints a vivid, engaging picture for listeners
	Selecting	Picking a story that is appropriate to the situation at hand and that clearly communicates concepts, ideas, or feelings
<b>PROCESS</b>  Describes how we work with experiences to transform them into meaningful and reusable stories	Indexing	Developing a flexible, vast, mental schema for retrieval of experiences and knowledge
	Synthesizing	Finding patterns in new experiences and creating connections between them and old ones
	Reflecting	Reviewing experiences with circumspection and extracting knowledge from them
<b>THE CORE</b>  Describes how we open ourselves to be aware and sensitive to stories	Eliciting	Asking questions and finding ways to pull stories from others
	Listening	Absorbing stories and invoking the imagination to enter them in a fundamental and deep way
	Observing	Practicing mindfulness to become aware of the stories implicit in others' words and actions

**Table 2. Three Levels of Personal Story Competencies.**

## Summary

A great deal of HPT consulting focuses on helping organizations develop these nine mission-critical communication competencies. Each competency has a collection of measurable personal and organizational behaviors that can be developed in a systematic way. For performance technologists, stories can play a significant role in conducting organizational and communication research (Boje, 2001).

One of the quickest ways to develop a holistic systems view of an organization is through collecting stories. Assessments that depend on didactic interviews can produce an inaccurate picture of the performance issue(s) an organization faces. Stories are encoded with information. Examining a large array of stories enables a performance technologist to discover patterns from which he or she can draw conclusions; this also results in a more reliable cause analysis. Creating summaries of these stories to substantiate findings facilitates communication with all parties involved. People may respond more readily to stories that support cause-analysis statements and performance recommendations than they will to reams of data and complicated theoretical models.

Stories are also powerful tools for developing and nurturing partnerships. Storytelling is a safe space for creative thinking, negotiating differences, and establishing commonality. As a practice, storytelling empowers performance technologists by improving communication through speaking and listening. 🏠

Note: Portions of this article are reprinted with permission from *The Strategic Use of Stories in Organizational Communication and Learning*, M.E. Sharpe, 2005.

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