"Having a business conversation with oneself?": Self-formulations as an interactional strategy

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1 Introduction

Within conversation analytical studies, formulations have been described as an interactional strategy used by recipients to verbalise the past talk in order to communicate their understanding of what has occurred (Garfinkel and Sacks 1970; further on Heritage and Watson 1979). This plays a significant role in assisting speakers to manage business and professional interactions in order to get work done. Drawing on research into the language of business meetings and decision making, it was noted that in particular circumstances the conversational practice of formulating was exploited by the initial speaker to self-formulate on their own words or on descriptions of past actions, in effect having a conversation with oneself. Interactively, self-formulating enabled speakers to communicate complex ideas in a coherent manner, systematically maintaining the sense of the conversation whilst avoiding the potential for interruption and disagreement until the message had been conveyed in its entirety. As a conversational strategy, the ability to self-formulate effectively is worthy of attention as it has a practical application in contributing to the effective running and decision making of workplace interactions.

The conference contribution presented a set of business meetings data that formed the basis of the analysis. It introduced Conversation Analysis as a method suitable for the analysis of discursive practices and for the identification of their prominence and distribution in authentic spoken interactions. The practice of self-formulating was linked to the occurrence of extended turns. The data analysis therefore focused on what was occurring discursively in these longer stretches of talk. It was clarified why self-formulations become instrumental for the development and coherent delivery of complex ideas and troubles as well as for fixing and transforming the key messages of the ongoing interaction; by implication, assisting in the maintenance of one's turn and in creating a conversational impact on the meeting at hand. The use of the practice of self-formulating was then illustrated by presenting an example of one extended turn – lasting over eight minutes of speaking time.

This paper provides a summary of the conference presentation. Further findings reporting on the practice of self-formulating are subject to an ensuing paper to be submitted for publication in 2019.

2   Data

The data were drawn from 67 meetings that generated over 60 hours of recorded meetings talk collected in a large Chamber of Commerce in the UK and of which almost eight hours of talk were fully transcribed. Unlike many Chambers in mainland Europe, the organisations in the UK are not centrally funded by government and membership is not mandatory. UK Chambers therefore rely on delivering services and business support programmes which are seen to assist business growth and for which businesses will pay. This focus on service delivery places demands on joint working, creative thinking and regular communication in order to get work done effectively.

The data were gathered from three operational teams over a period of 12 months. Two of the teams – the Regeneration Team (REG) and the International Trade Advisers' Team (ITA) – were delivery teams working with companies to assist them in improving their business performance. These two teams focused on offering business growth services and export services. The third team – the Information Technology User Group (ITUG) – was an internally-facing team working across the entire Chamber in order to improve IT services for its users. Each team was led by a Senior Operations Manager (SOM) who reported directly to the Chief Executive.

3   Methodology

Conversational Analysis provides a robust methodology for the analysis of spoken conversational data. One of the fundamental tenets in conversation analytical studies is that talk is structured, organised and has rules[1]. If we can record naturally occurring talk, this can then be transcribed and subjected to analysis and comparison in order to understand and question how we can communicate effectively in different social and professional contexts. The impact of CA studies is thus in the main applied to workplace and institutional interactions with research primarily looking to inform professional practice[2].

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[1] A notion originally proposed by Harvey Sacks and subsequently formalised in a joint paper "A simplest systematics for the organisation of turn-taking in conversation" (Sacks at al.1974).

[2] *See* Sarangi and Candlin (2010) for a discussion of professional practice and an explanation of why professional practice stands at the heart of applied linguistic studies.

The fact that talk is ordered locates the research focus to the direct observation and analysis of people talking their way through the business day. In business meetings 'talk is work' and 'work is talk'. Talk is not merely the conduit through which action is enabled. It is also constitutive of how individuals, through interaction, build a shared sense of understanding, achieve clarity, and make decisions on future work.

Drawing on Boden's (1994: 50-52) notion of "organizations in action", Figure 1[3] develops the link between, on the one hand, talk and, on the other, the key aspects of organisational life, its purpose, performance, and decision-making.

Figure 1: Talk as Work & Work as Talk: adaptation of Boden's concept 'Organizations in Action'

As Figure 1 conceptualises, organisations set the parameters and strategic targets within which meetings take place; each business team has operational goals that need to be achieved (Organisation – Purpose). Organisations create the framework, guidelines, and rules within which work must be accomplished (Organisation – Processes). In addition, all individuals who attend meetings bring with them their expertise, operational knowledge, and their intellectual and communicative capacity (People – Individuals and Job Roles). Functionally, each meeting thus aims through talk to progress the work of the organisation. The analysis of such interactions will determine to what extent and effect the teams manage this.

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[3] Originally published in Lohrova (2015: 17)

4 Analysis

4.1 The prominence of extended turns in business meetings

It was noted that in business meetings there was a significant preponderance of extended turns, that is, turns exceeding the minimum time limit of ten seconds. In the data, it was not uncommon for some turns to exceed one minute or more in length. Individual contributions in which speakers maintained the floor for ten seconds of speaking time or longer typically represented points of further conversational focus, the core of subsequent interaction.

Interactional asymmetry when speakers are either granted or able to hold a larger proportion of the conversational floor is a feature customary to the discourse of institutional and professional settings (Drew and Heritage 1992). Some of the seminal studies undertaken in the areas of classroom discourse (e.g. Sinclair and Coulthard 1975), courtroom talk (e.g. Atkinson and Drew 1979), news interviews (e.g. Heritage 1985), mediation (e.g. Greatbatch and Dingwall 1989), or psychotherapy (e.g. Antaki et al. 2005) persuasively document this.

While it may be tempting to attribute interactional asymmetry to professional roles and status, such as the boss does all the talking, the analysis needs to begin by addressing those features of the interaction to which the participants' conduct is demonstrably oriented (Drew and Heritage 1992). The central question to the analysis thus became: what was occurring discursively in the extended turns which enabled work to be accomplished.

The most striking finding was the compelling relationship between the frequency of extended turns used by speakers in the meetings and their duration. In business meetings, the practice of self-formulating – formulating on one´s own words or on descriptions of past actions – was inherently linked to the ability to maintain one's turn. By implication the successful use of self-formulations extended the time which a turn took to deliver.

Figure 2 below illustrates the relationship between the frequency of extended turns in the meetings and the total amount of meetings time that they took up. The data were drawn from four meetings and were representative of all the meetings observed over the twelve-month study.
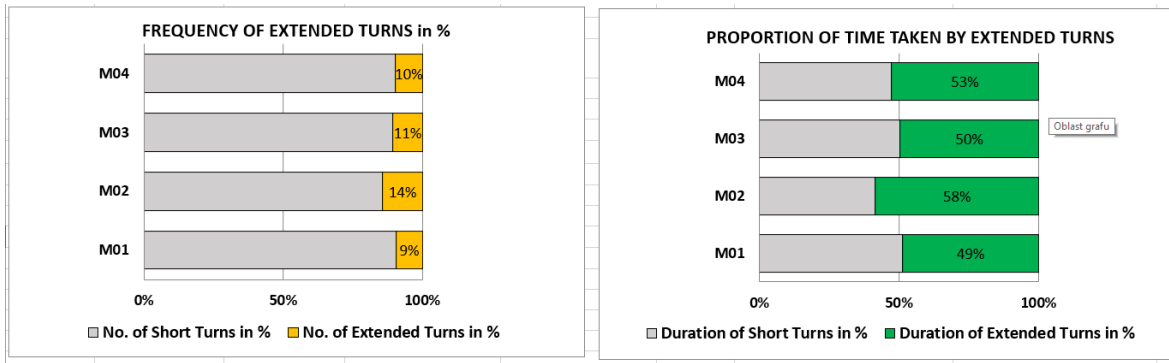
Figure 2: Extended Turn Analysis – four meetings

On average from across the meetings examined, approximately 11% of turns were realised in the form of extended turns, and these turns commanded more than 50% of the meetings time. In other words, although extended turns were considerably less frequent than were short turns, they indeed constituted the majority of the meetings time, and by implication the majority of the meetings talk occurred there.

Interestingly, in in meetings it was typically the Senior Operations Managers (SOMs) who produced most of the talking. SOMs dominated the meetings both in terms of the time they spoke for and in the use of long stretches of talk. Figure 3 presents a statistical summary of one of the IT User Group meetings and identifies the dominance of the SOM's conversational contribution in the meeting.

ITUG01_STATS (Focus on ETs)						
SPEAKER	**No. TURNS**	**No. ETs**	**Frequency of ETs in %**	**ETs DURATION (s)**	**Duration of ETs in %**	**DECISIONS**
Sharin	140	53	15%	2995	66%	13
Alistair	18	3	1%	45	1%	1
Amanda	90	17	5%	350	8%	0
Cohen	4	0	0%	0	0%	0
Duncan	16	2	1%	40	1%	1
Liz	7	0	0%	0	0%	0
Mike	25	4	1%	80	2%	1
Ron	12	5	1%	140	3%	0
Steve	20	5	1%	80	2%	0
Helena	2	0	0%	0	0%	0
All	22	0	0%	0	0%	0
TOTAL	**356**	**89**	**25%**	**3730**	**82%**	**16**

SHARIN	%
Turns in the meeting	39%
LTs in the meeting	60%
LTs:No. Turns	38%
LTs Duration	80%
LTs Duration:Meeting Duration	64%
Decisions	82%

Figure 3: ITUG01 Statistical Information

In the ITUG1 meeting Sharin was the SOM. He dominated the meeting both in terms of the number of turns he took in the meeting – 39% of all turns, as well as in the length of his contribution – 64 % of the total meeting's time.

Sharin's conversational dominance is perhaps not surprising given the SOMs' role to lead their departments and the authority that their role invested in them. Clearly, however, it became of interest to examine the discursive strategies used by SOMs to maintain their turns. These extended stretches of talk therefore became the focus of further investigation.

4.2 Self-formulating as an interactional strategy

The analysis of the extended turns identified a number of discursive strategies being used in combination with the aim to deliver information and progress work. One of these strategies was the repeated use of self-formulations, predominantly utilised by SOMs. Self-formulations assisted SOMs in maintaining their turn and allowed the unfolding of meetings talk whilst limiting the possibility for disruption or disagreement, in effect having a conversation with oneself or possibly thinking out loud.

Interactionally, self-formulating draws on the concept of "formulating a conversation" originally described by Garfinkel and Sacks (1970: 350):

> [D]escribe that conversation, to explain it, to characterize it, or explicate or translate, or summarize, or furnish the gist of it, or take note of its accordance with rules, or remark on its departure from rules.

In conversation, formulating may thus take many forms.

In business meetings data, the discursive practice of formulating was continually present. This comes as no surprise as meeting participants seek to collaborate in the meetings and through the use of formulations demonstrate their understanding of the past talk or seek to confirm their understanding of it.

To illustrate this, in the following example a formulation (T169, arrowed) is employed by an external consultant working with the International team who has been commissioned to undertake a marketing campaign. Consider the sequence of turns below:

Data Sample 1: ITA05_As part of the script – FORMULATION

Participants: <n Dee> External Marketing Consultant – a guest, <n Adam> Acting Chair, International Trade Adviser, <n Julia>, <n Max>, <n Sam> International Trade Advisers.

→169   <n Dee>Ok, so you know, (0.5) as part of the script that I would develop, is it

or me all right for me to be saying, uhm that maybe you're a sign-post mechanism to (0.3) help /support ? funding/ that could be available? (45:47)

170	<n Adam>	Yeah
171	<n Julia>	Hmh, [yeah, definitely]
172	<n Max>	[Hmh hmh]
173	<n Adam>	It's a very it it it's a fine line [<M> Mhm] between saying there is,
		[<D> Yes] and there may be.

Dee, the external consultant, begins her turn with a discourse marker 'Ok' punctuating the closure to the preceding talk. She is signalling that she has understood the past discussion and wishes to move the conversation forward. With the use of the turn-inference marker 'so', Dee then suggests a possible course of action by testing out the types of messages that she would want to communicate to the business community. She frames this as a question – 'is it for me all right to be saying' – and then formulates the past talk. The team members respond positively (T170 – T173) and the meeting moves forward.

The pervasiveness of formulations in professional contexts stems from their fundamentally twofold character – that of having both sense-making and sense-constructing properties. In business meetings, and in professional contexts more generally, formulations essentially summarise past talk in order to create a shared understanding, retain key messages, and edit and transform talk thus far, which in meetings traditionally leads to formulating proposals and decisions[4].

While highly frequent in business data, self-formulating has so far been given minimum attention. Conceptually, self-formulations – formulations of a gist when the speaker formulates on their own words or on descriptions of past actions – have been described in the seminal paper by Heritage and Watson (1979) when the authors discuss the role formulations play with respect to the management and organisation of talk at the level of topic. As Heritage and Watson (1979:149) assert (*emphasis* added):

> In many conversations, long sections of talk may be devoted to the descriptive
> unfolding of complex collections of matters. Where such a collection is available
> to one speaker but not to his or her conversationalists, the unfolding of that
> collection may involve the development of a turn pattern which consists of

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[4] Cf. Antaki (2008: 26-42) for the use of formulations in psychotherapy, namely, formulations serving the therapist´s interest in a number of ways – shaping symptoms, closing down troubles and tending interpretations towards the psychological.

a series of lengthy turns by the knowledgeable speaker complemented by short turns by that speaker´s recipients. **...**

In such environments, the provision of formulations by news recipients may elegantly address the problem of preserving a sense of cumulative understanding of long stretches of talk. *The provision of formulations (or formulating assessments) by communicators of troubles or, more generally, by those who produce a series of long turns, may also address the problem of achieving cumulative sense*.

In other words, Heritage and Watson recognise that not all meetings participants are equal in terms of knowledge or understanding of the discussion at hand. In those circumstances some speakers need more time to communicate their messages. They still, however, are required to deliver their messages in a way that the listeners can understand and make sense of. It is therefore necessary at periodic intervals to formulate on the past talk and retain a sense of its meaning which is projected into the continuing talk as it unfolds.

Formulations are thus a necessary part of discursive interactions and play an essential role in assisting participants in creating a shared understanding of what is occurring through talk while retaining those parts of that talk which inform the ongoing debate. By undertaking a formulation, a listener is testing or signalling their understanding of what is occurring. Equally, self-formulations if they are to assist listeners in making sense of the conversation must satisfy the same conditions and discursively achieve the same outcomes as would formulating activity undertaken between two or more meetings participants.

The analysis of self-formulating therefore informs the understanding of meetings interactions on two levels. Firstly, it generates an insight into how SOMs were able to sustain their extended conversational contributions. And secondly, it maps out how – if at all – self-formulations assisted in the unfolding of the meetings talk, its coherence and sense in order to get work done through talk.

4.2 A single-turn analysis – ITUG T3 Marcus

For the purposes of this article and to demonstrate the phenomenon of self-formulating the focus is directed to a single turn – Turn Three from the second meeting of the IT User Group (ITUG02_T3). It represents the longest single turn in the data recorded. At over 8 minutes long (500 seconds), the turn clearly illustrates Heritage and Watson´s (1979) assertion that self-

formulating as a discursive practice underpins the communication and descriptive unfolding of complex collections of matters (*see* above).

In the turn[5], Marcus updates the team on the progress in the adoption and implementation of a new document management system (DMS), a large-scale project that the organisation has decided to undertake. In addition to reporting and justifying the actions taken to date, the ultimate purpose of Marcus's turn is to guide the staff through the change and to develop a base of organisation-wide involvement in the project.

Turn ITUG02_T3 contains ten formulations that segment the turn into comprehensible chunks. All formulations are embedded alongside other discursive practices – most prominently including explanations and accounts – as it is through these that Marcus sets out the content and detail of what he has to say.

Discursively, the practice of self-formulating integrates the core themes in Marcus's turn with implications specific to the organisation. Self-formulations infuse Marcus's contribution with important interpretative and fixative properties; they summarise both the logic and rationale of the past talk and organisational action, then transform these into a set of key messages and decisions.

The key messages of Marcus's extended contribution may be retrieved from Figure 4 (below) presenting the summative content of the formulations contained in the turn. It is of interest to consider the way in which the formulations constitute the backbone of Marcus's input to the meeting:

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[5] *See* the Appendix for a full transcript of the ITUG02_T3

PRACTICE	ORIGINAL TEXT
ITUG02_T3_Marcus – Self-formulating the key messages	
Z	
E1	
F1(SC)	(0.6) Uh (0.2) but more IMPORTANTLY, it enabled us to see, that actually, (0.8) looking at (0.8) the way we manage documents, (0.6) there's two things we got to do. (0.2)
E2	
F2(FPD)	(1) So, (0.3) we've we've acknowledged the fact, that you need some sort of PROTOCOL, you need some sort of (0.3) RELATIONSHIP (0.2) map, to understand what you're doing, and what you should do about it. (1.1) <u>Now, (0.7) before we go into any solutions, we've decided that, actually what we REALLY need to do, is (24:40) have a thorough (0.3) FEASIBILITY study, (0.3) around what we're trying to do as an organisation.</u>
A1	
F3(FPD)	(0.5) So, (1.3) rather than come up with some actions, we think the first thing we need to do, is to get some feasibility. (0.3) The SECOND thing we've got to do, is REALLY embed this in what we want to do as a business. (2.3) <u>And therefore what we're proposing to do, we're getting the consultants back in on the: seventh of (0.4) (25:40) SEPTEMBER, (0.7) to do a presentation to (0.8) the: u:h (0.5) executives, through the STEERING group, (0.4) to kind of get them raise the game and to see what WE DO,</u>
A2	
F4(SC), D rep.	<u>So we've kind of taken half-a-step backwards, I think, (0.2) with the intention of getting the ex on board, and getting them to commit, (0.2) number one to an understanding that this is a bigger issue than just fixing (1.2) scanning (0.4) or whatever, and secondly, that we need to spend a little bit of money on that (27:20) feasibility study to get it right, (0.8) and that we need to go outside the business to get that. (0.3)</u>
E3	
F5(SC)	(1) However, what it HASN'T DONE, (0.2) all of that, is taken away some of the other ISSUES, that that we still GOT as a business, that that we kind of KNOW, but we can never kind of put our finger on,
E4	
F6(FPD)	<u>So, one of the things I want you to take back to your teams please, is (0.4) how MIGHT you approach this idea about the big picture, in terms of - - (0.2) uh (0.4) you know, where where you THINK your reference points are (28:40) for managing documents,</u>
A3	
F7(FP)	(0.5) So it would be useful if you can go back to your teams, to kind of get the scope of that, and secondly (0.2) (29:00) u:h a reinforcement to the fact, that this IS gonna be on the horizon, and it WILL grow, we WILL to have (sic) involve more people, we WILL have to do some data RESEARCH, as well! (0.2)
A4	
F8(SC)	So it depends a little bit on how exec go with it,
E5	
E6	
E7	
A5	
Z	
F9(FP)	so (0.2) we got to bring about a culture change where everybody is actually lined up to do (taps the table) this, before we spend (30:40) ANY amount of money,
A6	
F10(SC)	(0.2) so, (0.2) that's a kind of a long speech, but that brings us up to date on where we are. So we expect some feedback (31:00) after the seventh of September.

Figure 4: ITUG02_T3_Marcus – Self-formulating the key messages

It is perhaps not surprising that Marcus is required to self-formulate at particular intervals. As Heritage and Watson suggest, Marcus is the only one present who has an overview of the project. In order to maintain coherence and engagement of the meetings members, Marcus frequently needs to self-formulate in order to ensure the others are able to understand the messages. By implication, this creates a longer stretch of talk as Marcus, step by step, builds up a picture of what the team need to do.

As in the case of Marcus's turn above, self-formulations in the meetings data thus paved the way for the announcement of proposals and decisions, and for the initiation of agreed action. Having built the 'big picture' in self-formulations F1 to F4, Marcus (from self-formulation F5) started transforming the key messages into a collective action. He primed those present to become the ambassadors of the information just received and to start acting as news deliverers disseminating the change across the organisation.

Visually interesting, is perhaps an aggregate of the analysis of formulations F1 to F10 presented in Figure 5. The figure synthesises the key messages and articulates the dynamism of the language used by Marcus. It worth noting that in addition to being very methodical in the delivery of the messages and in their logical structuring, Marcus is also very good at using rhetorical devices of his voice to stress key words, ideas and actions.
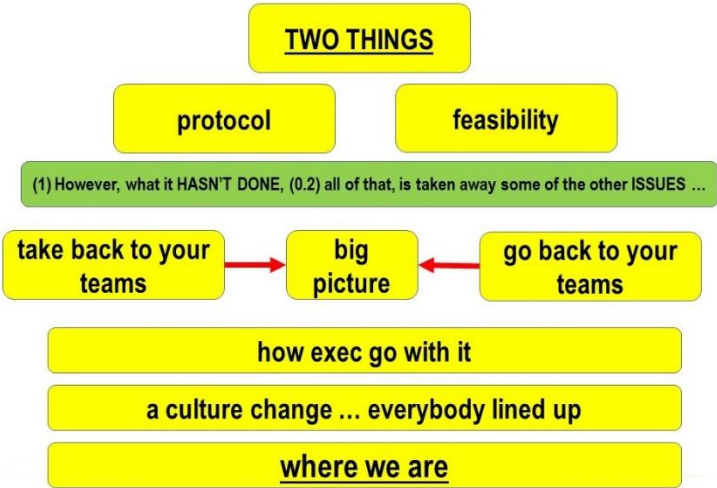

Figure 5: ITUG02_T3_Marcus – a visual representation of ITUG02_T3 key messages and actions

Importantly for the final outcome, self-formulations in Marcus's turn achieved more than simply reducing the talk into its summary. The employment of self-formulations at regular intervals throughout the turn introduced a specific interactive dynamic to the meeting. Firstly, having to absorb both the gist of the discussion and a prediction of future direction placed

demands on the active listening and comprehension faculties of those present at the meeting; by implication, it also engaged them in the talk.

Secondly, in their role of news recipients, meeting participants were expected to take in and process not only the individual messages but the entire contribution. Self-formulations were designed to assist in this. By presenting the information in bite-sized chunks, speakers were systematically introducing reference points that grounded the formulations in the fact, the justifications, and the reason constructed by the other discursive practices.

A point critical to the understanding of this interactive pattern, and of its implication for the practice of self-formulating, is that confirmations of formulations "are massively preferred".[6] More specifically, as Heritage and Watson (1979: 144, *emphasis* added) further clarify, such preference is inherent to formulations – of gist especially – because they:

> [D]escribe *materials which have been collaboratively furnished* through an ongoing temporal sequence of talk for which appreciations of that talk's orderliness and sense have been treated as *a basis for subsequent talk*.

Self-formulations introduced in the extended turns essentially represented the milestones reached within the interaction. When transferred without negation, they were treated as joint achievements thus fixated those points of the interaction that had been reached consensually.

5 Concluding remarks

The analysis of the data identified the phenomenon of self-formulations as being an expected and pragmatic outcome of talk in interaction. The ability to systematically lead meeting members to a single understanding of what is occurring is important if work is to be completed correctly. The use of self-formulations as a discursive strategy to maintain the speakers turn is essential if complicated ideas are to be communicated without disruption or debate. Key messages can be stressed and signalled to the listeners who in turn can retain these messages for future talk or communication in future meetings.

SOMs were highly effective in using self-formulations as part of a planned and co-ordinated strategy in the delivery of key messages. Discursively, self-formulating obviated the opportunity for second party interaction typically formed by verbal confirmations or

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[6] In this claim, Heritage and Watson (1979) follow from the findings of Pomerantz (1975) regarding the aspect of preference organisation of assessments produced by recipients.

disconfirmations; the traditionally expected response of adjacency pairing was fulfilled as part of the self-formulating activity. This enabled managers to prevent disruption or challenge from arising in the initial stages of the turn. Although their monologue created in the extended turn was not in its own right a conversation, by implication it was, however, required to behave as one.

In the analysis of the data, self -formulations were signalled in the longer stretches of turn taking, in the case of Marcus's turn in excess of eight minutes. In ITUG02_T3, Marcus used self-formulations to build and to transform the key messages into a collective action. The key messages were formed and made available to be taken forward into the subsequent talk of the meeting. As a discursive strategy, self-formulations were thus instrumental in maintaining the turn. Future research of self-formulating should therefore be directed at examining extended turns of talk as that is where self-formulations manifest themselves.

The application of the understanding of self-formulations as an interactional strategy in business meetings offers the potential to improve meetings effectiveness. Individuals who have the knowledge and skills to use self-formulating as part of their discursive repertoire improve their ability to communicate clearly and – if they are the team managers – to lead their teams effectively. This in turn contributes to the continuous development of their professional practice.

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Appendix

The transcript of the digital recording of the IT User Group (ITUG), Meeting 02, Turn Three

ITUG02_T3 - Document Management System (DMS)

IT User Group Meeting. Recorded 16/08/2005. Objective – to raise IT system problems and other performance-related issues, and to take part in the decision-making about IT strategy and policies undertaken by the organisation. 11 participants. In attendance - <Marcus> Chair, <Liz>minutes, <Sharin>,<Alistair>, <Amanda>,<Mike>, <Steve>, <Duncan>, <Ron>, <Cohen>, <George>. Duration 1hour 29min 21seconds.>

3	<n Marcus>	[Well, I think] that's probably the next thing, Document Management, and a quick update on (0.5) on what we're doing there (0.6) (coughs) uh (0.8) Sharin, (name surname, senior manager) and I went to see some consultants on a training course they ran, which was very helpful, because (0.4) their basic PREMISE was one where if you're trying to manage documents, (23:00) (0.4) there's a STACK of questions upfront, that (0.4) is worth sorting out, before you get ANYWHERE near (0.4) solutions, (0.2) scanning, uh digitising everything, whatever, (0.8) uh (0.2) which includes some fairly basic things, like you know, why do you keep documents, why do you keep records, what's is a rec- what is the difference between a record and a document, all sorts of things that actually set (23:20) a BETTER framework, to say, well, WHY DO YOU KEEP DOCUMENTS? Why do you create them, why do you keep them, why do you store them, how do you retrieve them. (0.6) Uh (0.2) but more IMPORTANTLY, it enabled us to see, that actually, (0.8) looking at (0.8) the way we manage documents, (0.6) there's two things we got to do. (0.2) Firstly, is really (23:40) understand what we're trying to do as a business, (0.8) for (0.4) managing our documents. We we've come at it, if you like, from several different angles, (0.8) u:h (0.2) one of which is the MOVE, (0.7) we know we got to start thinking about archiving, or moving, or potentially when we move, there will be less space, (0.2) so we need to think intelligently about stuff we want on our DESK, and stuff we DON'T want on our desk, (24:00) that's quite critical, and that's that's that's EFFECTIVENESS, isn't it, and efficiency. (0.4) And then secondly, it's about whether we as an organisation, are making the most out of (0.4) TEAMWORKING, (0.2) to say, well, actually when we create a record, which might be a CUSTOMER record, (1.4) probably each of our separate departments, (0.8) uh with the- -probably with the exception of Finance, (24:20) because you don't keep customer records in that sense, (0.4) could do our own thing. (1) So, (0.3) we've we've acknowledged the fact, that you need some sort of PROTOCOL, you need some sort of (0.3) RELATIONSHIP (0.2) map, to understand what you're doing, and what you should do about it. (1.1) Now, (0.7) before we go into any solutions, we've decided that, actually what we REALLY need to do, is (24:40) have a thorough (0.3) FEASIBILITY study, (0.3) around what we're trying to do as an organisation. We're trying to get some consultancy to help us DO that, uh (0.7) because we don't know what we DON'T KNOW. (0.8) And actually, uh (0.2) if we don't take a STRATEGIC view of all this, the DANGER is, we could take ANY route that might help us in the short term, scanning documents might (0.5) shift everything onto (25:00) some digital framework or microfiche, (0.4) and actually might get rid of PAPER, but might not actually HELP us in the long, in terms of coordinating records, getting SINGLE-client records together, for example, uh (0.6) working more COLLABORATIVELY to say, we're working with a client, or programme, or even in FINANCES, that a single piece of information can be accessed (25:20) through EVERYBODY, in the SAME WAY, so that we actually all know what we are doing. (0.5) So, (1.3) rather than come up with some actions, we think the first thing we need to do, is to get some feasibility. (0.3) The SECOND thing we've got to do, is REALLY embed this in what we want to do as a business. (2.3) And therefore what we're proposing to do, we're getting the consultants back in on the: seventh of (0.4) (25:40) SEPTEMBER, (0.7) to do a presentation to (0.8) the: u:h (0.5) executives, through the STEERING group, (0.4) to kind of get them raise the game and to see what WE DO, when Sharin, (name of aforementioned senior manager) and I went away, which is kind of look at the big picture, (0.4) like where my document management fit (sic) within, (0.8) you know, CORPORATE objectives within (0.2) TECHNOLOGY (26:00) objectives and all the rest of it, and is actually having the sense of (0.2) uh (0.4) what it's all about, and the REALITY is, I'm hoping, that the steering group will say, what we said was crikey, we actually DON'T know where we ARE, and we DON'T know where we wanna BE, (0.3) and therefore the point of a feasibility study is to start (0.3) doing some some work on, well, (0.2) what sort of scale is the problem, how many records (26:20)

DO we create, (0.2) retrieve, move about, access, (0.2) you know, what is the scale of it, what is the: OPPORTUNITY for us in terms of u:h (0.2) efficiency, saving money, saving effort, (0.2) and also, what is the cost of doing it, (0.3) 'cause (0.2) the FINAL thing we - - they did, was uh a sort of (0.2) SHOWCASE of all the potential (26:40) suppliers out there, and believe you me, there are a MILLION and one suppliers out there who've all got their little angle on, how to manage your documents better, (0.3) and we did get a presentation from firm who had a SOFTWARE application, which was about, (0.2) fundamentally about a DESKTOP (f) organisation, wasn't it, like [<S> mhm] like Google Search, if you've seen that one, that was a way of quicker accessing what you've got, easier access (27:00) but that didn't actually solve the bigger problems, about what are we trying to do. So we've kind of taken half-a-step backwards, I think, (0.2) with the intention of getting the ex on board, and getting them to commit, (0.2) number one to an understanding that this is a bigger issue than just fixing (1.2) scanning (0.4) or whatever, and secondly, that we need to spend a little bit of money on that (27:20) feasibility study to get it right, (0.8) and that we need to go outside the business to get that. (0.3) So the idea is on the seventh of September, we'll have a short presentation from the consultants, (0.2) kind of, giving a bit of exposure to the big PICTURE and getting the executive to say, YEAH, ok, u:h we NEED to take some action on that, it seems to be the right thing to do, is to do the feasibility study, and here is a BUDGET to DO it_ (27:40) (0.3) u:h and then we're gonna spend the rest of that DAY (0.2) with the: (0.2) uh document management system working GROUP, (0.2) trying to SCOPE THAT OUT what we need to do in terms of information, shaping it, putting a plan together, (0.2) uh (0.2) before we actually write a cheque for somebody to go 'n have lot of money (0.4) uh from us. Does that make sense? (28:00) (1) [<Mi> Yeah] (breathes in) (1) However, what it HASN'T DONE, (0.2) all of that, is taken away some of the other ISSUES, that that we still GOT as a business, that that we kind of KNOW, but we can never kind of put our finger on, like, you know, are we being as efficient as we can around managing our documents, are we looking at simple protocols that might improve (0.2) the way we work, the way we create files, the way we share files, (28:20) uh (0.2) and the the the MOVE, although it's been put BACK, (0.2) u:h is still looms as being something that will force the pace, and will get people to think about it. So, one of the things I want you to take back to your teams please, is (0.4) how MIGHT you approach this idea about the big picture, in terms of - - (0.2) uh (0.4) you know, where where you THINK your reference points are (28:40) for managing documents, 'cause it's easy for us all to say, there are no company protocol (sic), (0.2) uh but actually, we all DO things, (0.6) we all DO create, (0.2) store, retrieve, (0.2) uh handle (0.2) documents, files, whatever, (0.4) all the time_ (0.5) So it would be useful if you can go back to your teams, to kind of get the scope of that, and secondly (0.2) (29:00) u:h a reinforcement to the fact, that this IS gonna be on the horizon, and it WILL grow, we WILL to have (sic) involve more people, we WILL have to do some data RESEARCH, as well! (0.2) [<A> mhm] so, you know, actually, (0.5) if if these consultants came to us, and said, well, how many documents have you GOT, (1.5) that you might create in a YEAR, (0.5) I, personally, would have the trouble getting and coming up with a number. (29:20) (0.4) I mean the only way we can do that, is a bit of data gathering, so we will be involving the group to go back and say, (0.4) uh (0.2) you know, what's the scale of all this. Does that make sense? (0.2) [<A> Mhm] So it depends a little bit on how exec go with it, Sharin has been doing his best to warm them up, so that it is not a surprise, (0.2) and (0.2) clearly there is an UNDERSTANDING, that, you know, we can't do this INTERNALLY, we can't do it SMARTLY (29:40) internally, (0.2) the FINAL thing to say, is that whenever the consultants kind of tried to get us a MARKER for what it's at, they talked very much in terms of a three-year plan, (1) uh (0.4) this - - you know, were thinking, well, if we could bring about some changes, we got the move, we could (0.2) make some decisions about maybe buying some (0.2) different technology, maybe getting a scanning (30:00) protocol, you know, getting a set of words about how to create a file, (0.2) cr- - uh using some software that stop people creating a new client file if one already existed somewhere else, those are all things are very doable in the SHORT term, but I think, it's CONVINCED us that we need to go back, and it may be (0.2) year TWO? before we start seeing some real BENEFITS (0.3) coming through, (0.2) 'cause it's it's also about change management process (30:20) isn't it (1.7) we as an organisation are not very good A: at making decisions saying everybody will do this THIS (ff) (pounces the table loudly), and sticking to it, uh we're even worse at deciding what the THIS IS (pounces the table). So, (0.2) does that make SENSE_ and I'm getting some smiles, so you do understand what I mean, [[(all laugh)] so (0.2) we got to bring about a culture change where everybody is actually lined up to do (taps the table) this, before we spend (30:40) ANY amount of money, and FRANKLY, some of the stories we've

heard, is that people can spend (0.2) uh, you know, ZILLIONS on technology and software, to achieve these kind of things, and for some firms it works brilliantly_ (0.2) but we ain't in that market, (0.2) we've got to have a solution that's gonna work for us, (0.2) so, (0.2) that's a kind of a long speech, but that brings us up to date on where we are. So we expect some feedback (31:00) after the seventh of September.