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Individual unlearning from the point of view of managers in merger and acquisition events in Brazil*

Desaprendizaje individual desde el punto de vista de gerentes en situaciones de fusiones y adquisiciones ocurridas en Brasil

Le désapprentissage individuel du point de vue des dirigeants dans les situations de fusions et acquisitions produites au Brésil

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Abstract

Unlearning goes on to constitute a mechanism that facilitates the acquisition of new learning, and as such, represents a way for dealing with personal resistance in relation to processes of organizational change. In spite of the importance of the theme, it is argued that there exists little empirical understanding on the form through which unlearning operates, which collaborates toward the approach of the theme, in organizational research studies, being conceptually confusing. In this way, this research analyzes that which represents unlearning and its relationship with learning, from the perspective of managers that have experienced an unlearning situation from the events of mergers and acquisitions. The study method is based on a narrative analysis that is focused on reports from 20 managers from middle and top level of large sized Brazilian companies, all of which experienced a merger and acquisition event. The results show that a majority of managers have been through some kind of unlearning, which represented the way by which the practice of old learnings was interrupted, through the proposal of adaptation to the new work context. In addition, unlearning was noted not to necessarily represent the forgetting of prior learnings, which may themselves be maintained in the repertoire of individual knowledge. For some managers, however, unlearning can lead to the modification of previous understandings on a particular subject. Finally, the results show that unlearning may occur, without the

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need for the occurrence of any new learning. The study contributes toward the deeper understanding of the nature surrounding this phenomenon and associated types, thus producing implications to research on the theme concerning management learning.

Keywords: Individual unlearning, Managerial unlearning, Managerial learning, Mergers and acquisitions.

Resumen

El desaprendizaje se constituye en un mecanismo facilitador de la adquisición de nuevos aprendizajes y, por eso, representa un medio de lidiar con la resistencia personal en relación a los procesos de cambio organizacional. A pesar de la importancia que se concede a la cuestión, se argumenta que hay poco conocimiento empírico en la forma en la que opera, lo que colabora para que el abordaje al tema, en las investigaciones en organizaciones, sea conceptualmente confuso. De ese modo, esta investigación analiza lo que representa el desaprendizaje y su relación con el aprendizaje, desde la perspectiva de gerentes que han experimentado una situación de desaprendizaje de eventos de fusiones y adquisiciones. El método de estudio se basa en el análisis narrativo de relato de 20 gerentes de nivel medio y alto de empresas brasileñas de gran tamaño, todos los cuales experimentaron un evento de fusión y adquisición. Los resultados muestran que la mayor parte de los gestores experimentó algún desaprendizaje, que representó el camino por el cual la práctica de antiguos aprendizajes fue interrumpida, con el propósito de adaptación al nuevo contexto de trabajo. También, se observó que el desaprendizaje no necesariamente representa el olvido de aprendizajes previos, los cuales pueden ser mantenidos en el repertorio de conocimientos individuales. Para algunos gestores, sin embargo, el desaprendizaje puede llevar a la modificación de entendimientos previos sobre un determinado asunto. Por último, los resultados muestran que el desaprendizaje puede ocurrir sin que, necesariamente, nuevos aprendizajes ocurra. Este estudio contribuye a la comprensión más profunda de la naturaleza que rodea este fenómeno y los tipos asociados, así produciendo implicaciones para la investigación sobre el tema del aprendizaje gerencial.

Palabras clave: Desaprendizaje individual, Desaprendizaje gerencial, Aprendizaje gerencial, Fusiones y adquisiciones.

Résumé

Le désapprentissage devient un mécanisme qui facilite l'acquisition d'un nouvel apprentissage et, par conséquent, représente un moyen de faire face aux résistances personnelles par rapport aux processus de changement organisationnel. Malgré l'importance accordée à la question, on soutient qu'il y a peu de connaissances empiriques dans la façon dont elle fonctionne, ce qui contribue à rendre confuse l'approche de la question dans la recherche au sein des organisations

sur le plan conceptuel. Ainsi, cette recherche analyse la représentation du désapprentissage et sa relation avec l'apprentissage, du point de vue des gérants qui ont vécu une situation de désapprentissage d'événements de fusions et acquisitions. La méthode d'étude est basée sur l'analyse narrative des comptes de 20 gérants de niveaux moyen et haut, de grandes entreprises brésiliennes, qui ont tous vécu une fusion et une acquisition. Les résultats montrent que la plupart des gestionnaires ont connu un certain désapprentissage, qui a représenté la voie par laquelle la pratique de l'ancien apprentissage a été interrompue, dans le but de s'adapter au nouveau contexte professionnel. Il a également été observé que le désapprentissage ne signifie pas nécessairement l'oubli d'un apprentissage antérieur, qui peut être maintenu dans le répertoire des connaissances individuelles. Pour certains gestionnaires, cependant, le désapprentissage peut mener à la modification des connaissances antérieures sur une question donnée. Enfin, les résultats montrent que le désapprentissage peut se produire sans qu'il y ait nécessairement de nouveaux apprentissages. Cette étude contribue à une meilleure compréhension de la nature de ce phénomène et des types associés, ce qui a des implications pour la recherche sur le thème de l'apprentissage en gestion.

Mots-clés: Désapprentissage individuel, Désapprentissage du management, Apprentissage du management, Fusions et acquisitions.

1. Introduction

The contributions that are of importance to unlearning in the context of organizations, came together over the 1970's and 80's, these emphasized that managers continually run the risk of their previous learnings, such as knowledge, beliefs, cognitive maps and ways of making decisions, being incorporated into a repertoire of standardized answers to problems, as a result of their valuing accumulated experience and past successes (Bettis and Prahalad, 1986; Hedberg and Jönsson, 1978; Nystrom and Starbuck, 1984). As the understanding of the reference frames used in management activity tends to arrive at the consolidation of dominant ideas and rigid behavior patterns, it is believed that managers become less able to respond to challenges that arise, thus adding instability into the environment. Therefore, in order to deal with the effects managerial inertia originating from such behavior where it is necessary to take people onto the unlearning of old learnings and ways (Hedberg, 1981). This in effect means throwing out knowledge evaluated as mistaken or obsolete and

substituting it for the new, evaluated as necessary to the establishment within the organization of new answers.

After three decades from the initial contribution to the development of the theme, recent approaches in the study of administration and organizations have come to recognize individual unlearning, as a means through which an individual can break away from the effects of impediments created by acquired learnings, with proposals for facilitating the acquisition process of the new (Becker, 2005, 2010; Cepeda-Carrión, Cegarra-Navarro, Martínez-Caro, and Eldridge, 2011; Hislop, Bosley, Coombs, and Holland, 2014; Cegarra-Navarro and Rodrigo-Moya, 2005; Tsang and Zahra, 2008). The different theoretical perspectives of human learning recognize that previous learnings are important elements for the development of new learnings, through a process in which acquired understanding is taken as the starting point for formulating new interpretations (Merriam, Caffarella, and Baumgartner, 2006). On the other hand, discussions concerning unlearning take into consideration that previous learning has the potential to inhibit new learning acquisition, especially when dealing with behavior where the individuals look to protect old knowledge, and commonly ignore information that is contrary or in conflict with such ideas (Becker, 2005; Rushmer and Davies, 2004).

Besides the recent and tough criticism made against the theme by Howells and Scholderer (2016), who questioned the theoretical consistency of unlearning and of research on the theme, researchers from the field of organizational studies emphasize the relevance of a return to finding an understanding into the phenomenon, especially, through the ample potential for research associated to the concept (Tsang, 2017). In this perspective, it has been estimated that individual unlearning goes on to constitute an element for dealing with personal resistance in relation to processes of organizational change, innovation and solutions to organizational problems.

This is shown through the studies of Casillas, Acedo, and Barbero (2010), whose results indicate that unlearning facilitate new

learning in the organization while realizing internationalization processes, as well as Cegarra-Navarro, Eldridge, and Wensley (2014), who bring with them evidence that unlearning can elevate the organizational capacity for the absorption and application of external knowledge. In addition, Brook, Pedler, Abbott, and Burgoyne (2016) verified that unlearning can facilitate understanding and the finding of solutions to wicked problems.

However, even with the importance given to the theme, it is argued that there exists little empirical understanding on the form through which the unlearning mechanism operates, nor the degree of its effect on individual learning, which has contributed towards theoretical developments around the idea of unlearning in organizations being seen as conceptually confusing (Akgün, Lynn, and Byrne, 2006; Hislop *et al.*, 2014; Martin De Holan and Phillips, 2011; Tsang and Zahra, 2008). Therefore, this article had the objective to analyzing what unlearning represents and its relationship with learning, through the perspective of managers that experience an unlearning situation from the point of view of merger and acquisition events (M&A). These M&A operations tend to generate profound changes in the work environment of individuals, due to alterations commonly realized through culture, management models, structure and processes of operations and organizations (Buono and Bowditch, 2003), and for this reason were considered as events inductive to unlearning.

The theoretical contributions in this study come from evidence found in the unlearning process of individuals and their elements from the interpretation of the very individuals themselves. In this context, emphasis is given to what makes up the experience of the individual in unlearning, the unlearning content, and the effects these have on previous learning and individual knowledge. In addition, a contribution of a methodological nature is made, by way of narrative analysis, which looks to finding an understanding that points to the need for widening the theoretical-empirical and qualitative investigations concerning the theme (Antonacopoulou, 2009; Martin De

Holan, 2011; Yildiz and Fey, 2010; Zahra, Abdelgawad and Tsang, 2011; Zhao, Lu and Wang, 2013).

2. The origin of the unlearning idea and its appropriation into the context of organizations

The original formulation of the unlearning concept can be found in the theory of interference, given as one of the explanations of experimental psychology for the phenomenon of human forgetfulness (Postman and Underwood, 1973). From the cognitive point of view, memory and learning are inseparable, in so far as memory means the capacity of the individual to store and retrieve previously learned information. If learning presupposes the change in behavior that originates from experience, memory shows itself as the cognitive and psychological effect from experience, in the form of new learning (Baddeley, Eysenck, and Anderson, 2011; Lefrançois, 2012).

In terms of the theory of interference, incidental forgetfulness, or be it, the occurrence of failures in memory without having had the intention of forgetting, can occur due to the formation of similar memories, which can interfere one with the other, during an attempt to retrieve a particular memory. In light of this phenomenon, known as competition of responses, Melton and Irwin (1940) considered that retroactive interference was due to a weakness or unlearning from the original stimulus-response relationship, during the acquisition of new learning. Therefore, in such a context, unlearning means the reduced availability of previously learned responses, through the effect of the obstruction of old memories by new ones (Postman and Underwood, 1973).

The appropriation of the unlearning idea, for the field of organizational studies, seems to consolidate itself through the work of Hedberg (1981), under the title: How organizations learn and unlearn. The author bases the discussion on the relationship between learning and unlearning in some of the conceptions and experimental results on the theory of interference and the extinction mechanism. This is noteworthy in the work from Postman and Underwood (1973), who

contributed to the dissemination of the understanding that unlearning involves the inhibition of expressing previously learned behavior, in some cases through the effect of interference caused by new learning. Along this line of thought, for Hedberg (1981, p. 8), the rate at which individuals in the organization acquire new knowledge, should substitute the old, by means of “a process by which learners discard knowledge”, which he denominated as unlearning.

The subsequent investigations (Bettis and Prahalad, 1986; Nystrom and Starbuck, 1984) emphasized understanding according to that which the unlearning is configured into a facilitating mechanism of the alteration process of behavior in managers. In such an understanding beliefs, perceptions, ideas and old knowledge along with obsolete thinking should be eliminated to provide a place for the new, as a form of favoring the suitability of the organization to environmental demands.

3. Individual unlearning in organizations

It was only from the year 2000 onwards that the concept of individual unlearning went on to be the object of discussion in organizational studies, and the examination of published studies shows that unlearning is considered mainly through the relationship between the learning and unlearning processes. In such, one identifies those studies that take unlearning and the subsequent acquisition of new learning as phases of the same process or dimensions of an unlearning context (Cepeda-Carrión *et al.*, 2011; Macdonald, 2002; Cegarra-Navarro and Rodrigo-Moya, 2004). Others, however, see unlearning as being distinct from the learning process (Becker, 2005, 2010; Becker, Hyland and Acutt, 2006; Rushmer and Davies, 2004; Tsang and Zahra, 2008), and even approaches that evaluate unlearning as a form of learning in itself (Hislop *et al.*, 2014).

In Cegarra-Navarro and Rodrigo-Moya (2004) the theme of individual unlearning is explored through the perspective of the individual context of unlearning, by which one wishes to express that the organization should create a context favorable to unlearning, by the institution using means that stimulate and

facilitate changes in the vision and opinions of its members. The individual context of unlearning is formed by three elements: the autonomy conferred to the individuals, in order that they can develop innovative actions and generate new opportunities; tolerance to error, the necessary adoption of a posture of experimentation on the part of the organization; and finally, the search for satisfaction and compromise of the individuals in the organization, seen as relevant to the disposition of the individual to integrate and share knowledge one with the other.

Highlighted here is that even though the work of Cegarra-Navarro and Rodrigo-Moya (2004) is restricted to the discussion on the principle characteristic elements of an individual unlearning context, it brings as a contribution the understanding behind the importance of constituting an organizational environment favorable to unlearning. Such a notion is present in the investigations performed by other authors, among such one notes the approach proposed by Cepeda-Carrión *et al.* (2011), in which the authors take the context of unlearning as the dynamic organization favorable to the substitution of old knowledge for new. This process is performed by means of the reorientation of organizational values, regulations and behavior, as with that which concerns the modification of cognitive structures, mental models, dominant logic and fundamental presuppositions that direct the behavior of individuals.

Based on this assumption, the Cepeda-Carrión *et al.* (2011, p. 601), defines individual learning as the “situation where employees have the facility to abandon or forget old habits, beliefs, knowledge and knowledge structures and substitute new habits, beliefs, knowledge and knowledge structures”. The approach indicates, in a clear manner, those defining elements to the individual unlearning process, such as the type of learning before the unlearning, or be it, that which is not shown as adequate to the new knowledge structures, which are now valued by the organization. Furthermore, the recognition by the individual as to the need to unlearn something is flagged and facilitated by the organization, by means of mechanisms from the unlearning context.

Individual unlearning is seen also as a distinct process of learning, as in the case of Becker (2005, 661), for who unlearning is “the process by which individuals and organisations acknowledge and release prior learning (including assumptions and mental frameworks) in order to accommodate new information and behaviours”. The concept of proactive inhibition, according to which the individual tends to protect knowledge already acquired and ignores conflicting information (Lyndon, 1989), justifies the need to, at times unlearn, as at the same time in which the previous knowledge is shown to be important to individual learning, this can also act as an inhibitor of new learning.

Knowledge should not be the only subject of unlearning, but also the reference frames, understood as the belief and value system underlying the attitudes and behavior of the individual and thus should be examined, in order that new learning can take place (Becker, 2005). As an argument, the author, in another study (Becker, 2010), states unlearning has as its end result to take the individual to the abandonment of pre-existing learning that are in conflict with the change desired by the organization, and thus facilitate the acquisition of new learning, necessary to the efficiency of the change process.

For the authors Tsang and Zahra (2008), unlearning in the organization occurs when there is the discarding of old routines. As the elimination of routines makes the individual modify the work practices, the continuation of procedures inherent to a discarded routine means that the organizational unlearning process was not successful. Therefore, when the individual stops executing the processes relevant to the discarded routine, there occurs individual unlearning, defined as the “the case where a person becomes aware that certain items of knowledge he or she possesses are no longer valid or useful” (p. 1444).

Finally, one has the approach proposed by Hislop *et al.* (2014). Different to the other concepts that have been discussed until now, the authors indicate that individual unlearning is based on a special type of unlearning, and does not imply in the destruction or permanent loss of that already learned by the individual. As here,

it is recognized that unlearning represents a conscious decision not to use a particular knowledge understanding, which can be activated again by the individual at a future date. The authors (2014, p. 556) define individual unlearning as “a distinctive type of learning, involving a conscious decision to give up knowledge, value, or behaviours”. In addition, the content that is no longer used continues to be part of individual knowledge, and as such can be brought back into play under some future pretext or situation.

4. Research methodology

From the point of view of philosophers of science, the study was directed by the philosophical assumptions of interpretivism, for which the essential element is understanding, and according to which, it is not possible to comprehend the social world along the paths set by natural and physical sciences (Hatch and Yanow, 2003). As an investigative strategy use of thematic narrative research, which is set out in line with approaches that from the epistemological and methodological point of view, allow for the understanding of the investigated phenomenon in an interpretative manner (Flick, 2000; Riessman, 2008).

The narrative is considered to be an oral and retrospective report on experiences lived out by the individual in its context of an action, performed in a personal and direct manner to a listener (Schütze, 2014). The use of the narrative as a qualitative research strategy is based on the understanding that, once stimulated to narrate a situation, people remember what happened and are urged to organize their experience into a sequence of happenings connected through a temporal or casual mode (Riessman, 2008; Schütze; 2014). Along this line, the unlearning experiences lived out by managers were taken as the focus of the analysis in the narratives, without, however, disregarding the broader and social context, on which these experiences were lived out and interpreted (Riessman, 2008). Sequentially, each of the steps fulfilled in the methodological approach are repeated.

4.1. Selection of research subjects

The subject group comprised of 20

managers from middle and top level, all of which experienced an M&A event in their professional careers. These managers represent 12 different large sized Brazilian companies, as shown on Table 1.

The selection of participants was based upon convenience and ease of access. In order to fulfill the selection process, the following criteria were considered: were they acting as a manager at the time of the M&A operation; in the case of acquisition, acting as a manager in the organization that was acquired; and had the attribute of coordinating the work of other people. A majority of the managers – 13 in total – were accessed directly by the researcher, through the sending of invitations and personal indications, while the other seven were accessed by means of the human resources sector of the company where they worked. The definition of the quantity of participants was given through the data saturation criterion, as well as by the observation of the recommendation in terms of the maximum number of individual interviews to be performed by the researcher, which is between 15 and 25 (Gaskell, 2000), as a form of maintaining the quality of the analyses.

4.2. Data collection

The data were collected during 2016 by means of individual interviews, performed on a personal level or via Skype, and as such, each manager participated in only one interview. Before each interview, a term of information was given to the participant, in which the objective of the study was made known (analyze s unlearning situations lived by managers during M&A events), the procedures for data collection, as well as the commitment to the anonymity of the participants and the organizations mentioned.

The interviews were conducted by only two researchers, based on a semi structured script, with questions on the organization in which they worked, the experienced M&A situation, the changes that occurred and the experienced unlearning situation. During the conversation, the subjects were given the definition of unlearning adopted in the study, that is, unlearning is the process by which the person, due to a particular situation, lets go of or gives up old learnings, such as knowledge,

Table 1. Profile of interviewed managers

Name	Age	Position held during the M&A	Sector	Year of M&A
Arthur	33	Research and Development Manager	Software	2014
Brandon	54	Customer Service Manager	Contact Center	2006
Charles	43	Senior Auditor	Food Industry	2009
Douglas	40	Software Product Manager	Software	2014
Edward	52	Director of Marketing and Communications	Aviation	2012
Ava	40	Customer Service Manager	Software	2007
Gabriel	33	<i>Services Support Coordinator</i>	Software	2014
Hugo	37	Subsidiary Manager	Software	2014
James	59	Project Manager	Petrochemical	2008
Joanna	33	Support Supervisor	Software	2014
Laura	28	Administrative Supervisor	Software	2014
Mark	50	Production Coordinator	Food Industry	2009
Martha	65	Academic Director	Higher Education	2014
Oscar	55	Project Manager	Agrochemical Industry	1997
Paul	59	Production Coordinator	Petrochemical	2010
Peter	48	Human Resources Director	Aviation	2012
Robert	41	Engineer Specialist	Petrochemical	2010
Thomas	33	Commercial Manager	Shopping Centers	2010
Teresa	56	Management Advisor	Higher Education	2007
Walter	27	Research and Development Manager	Software	2014

Source: Author's own elaboration.

ways of thinking and behavior. The interval between interviews was between 40 and 70 minutes.

4.3. Treatment and analysis of data

After the interviews, the following steps were adopted in the research data analysis: a) full audio transcription of each of the interviews; b) reading of the transcribed interview, with the aim of identifying and ordering, casually and chronologically, the activities and experience lived out, as well as the elements relevant to the activity context in which the report was given; c) composition of the retold narratives; d) sending by email of the narratives to the respective individuals, for validation of the interpretation of the data performed by the researchers; e) reading of narratives, with the aim of outlining the present thematic areas and identify their elements; f) group together and analyze the units of analysis, identified across all narratives, according to categories present in each thematic domain.

The retold narratives from the interviewees

totaled 40 pages in single-spaced text. However, due to the limit placed upon article length, the narratives were not included in the presentation of the results, but are available through the main author. Three thematic domains were identified in the narratives, from which the discussion of the results was made, in the following one finds the discussion of the results in relation to the unlearning experience of the managers such domains are: why unlearn, what do managers unlearn, what does to unlearn mean, and what is its relationship with learning.

5. Findings

In this research study, the focus fell upon the analysis of the unlearning narratives from the interviewed managers, and emphasis is given to the fact that seven managers did not experience any unlearning from the change event represented through the M&A. In the case of three of these managers (Ava, Edward, and Hugo, all names are fictitious), even with changes in terms of politics and work processes in their work environment, the adaptation to the new work context did

not demand any unlearning, as there was a personal identification with the beliefs and values professed by the new organization. In these cases, one notes that the adaptation to the new work context involved only the cognitive assimilation of aspects from the new environment, without the need for previous understandings to be altered (Illeris, 2009).

The other three managers (James, Oscar, and Paul), even with the new demands imposed by the new work situation, resisted unlearning elements from their behavior. For these managers, the process of change brought negative consequences to the organization, such as the elimination of the existing culture, the adoption of managerial standards and operations lower than those previously practiced, the loss of basic values of the organization, with which they all felt a strong identification. Therefore, they did not want to adopt the new working way of acting instituted in the organization, or be it, act in accordance with the mental model, the directives and values or ethics, as currently practiced by the organization. Noteworthy here is that all three left the organization only months after the M&A, one individual to retire and two for other work opportunities.

Finally, for one particular manager (Robert), unlearning did not make any sense, as you do not see yourself, “forgetting a history of learning”. He considers that the situation experienced during the M&A process, which demands adaptation to the new working context, is better described as a relearning, as the more the old way of working lost its validity in the organization, this represented the starting point for acquiring of new learning. In some way, all that had been previously learned takes part in the processes of new learning, where it is not possible to simply “forget” what has been learned and acquire new learnings from zero.

For Robert, in spite of the definition that was presented to him during the interview, unlearning presented itself as a deliberate forgetting, which indicates how the phenomenon can be classified through common sense. It is not by chance that one observes, in the discussions in the organizational field, the effort to detach unlearning from the notion of forgetting, as a form to better delimit the concept (Hislop *et al.*, 2014).

In the following, the experiences from the other managers - 13 in total - are reported.

5.1. Why unlearn?

The changes in the organization and the work environment, which follow the M&A operations, were the triggers of the unlearning process lived out by the managers, and these spoke of mainly the modifications made to policies, practices and management tools, along with alterations to organizational structure and work processes. These modifications in some cases (Brandon, Mark, Martha, Thomas, Teresa, and Walter), represent as a drastic and profound change of organizational culture that now watches over the organization. For many interviewees, the new work context, besides changes evaluated as positive and necessary to the maintenance of competitiveness in the organization, brought insecurity regarding their role in the organization, as well as the fear of demission (Brandon, Charles, Douglas, Joanna, Laura, and Peter).

Along this line, in order to adjust to the demands imposed by the new work context, and act in consonance with the ongoing changes, it was necessary to not only learn new modes of conduct and permissible acts, but also equally unlearn some of the ways in which they thought or acted. The managers described these, as “not do many of the old things” (Mark), “let go of” principles and values (Teresa) or “abandon the good things of the previous culture” (Thomas). As reported by one of the managers, to unlearn was “a question of survival and a process, where change was imperative” (Peter), an interpretation noted in the understanding formulated by other managers, in which the context that operated at that time, was not conducive to exert influence on the direction of the changes (Martha, Thomas, Teresa, and Walter). For this reason, through these uncertainties and the sentiment of anxiety in light of these changes, the managers showed that to unlearn was a way toward maintaining their actual position (Brandon, Joanna, and Mark) or even to avoid their dismissal (Charles, Douglas, Gabriel, Laura, and Peter).

On the other hand, some managers point out that unlearning was necessary

Table 2. Unlearned technical knowledge and methods

Manager	Unlearning content
Arthur	Procedures relevant to the process of attending to a client
Charles	Perform auditory projects with a wide scope, focused on the evaluation of all the work processes within the business Knowledge concerning wide scope auditory methods
Douglas	Execute the process of attending to the client in an informal manner and without following standardized procedures
Joanna	Excessive focus based on technical management
Laura	Previously executed routine for revenue and sales services. Develop the project for an informal mode and without registration documentation
Mark	Management model for industrial maintenance, where the absence of preventative maintenance procedures prevail
Martha	Carry out the academic project that was carried out in the institution
Peter	Recruitment and selection process, previously in management
Source: Author's own elaboration.	

for the acquisition of new learning and for professional growth itself. For example, to learn the new way of organizational working, due to the implementation of managerial models and practices better developed than those previous, as well as deal with new challenges imposed by the work environment, was seen as an alternative to acquiring new learning and develop as a professional (Laura, Mark, Thomas, and Walter).

5.2. What do managers unlearn?

Through the analysis of the content of unlearning by managers, one identifies three categories relevant to the types of previous unlearned learning, those being, technical knowledge and methods, attitudes and habitual modes of acting, as well as beliefs and convictions. It was sought to outline such terms according to definitions offered through learning psychology (Lefrançois, 2012), by which knowledge is a generic term for all the information acquired and used by the individual, while attitudes are the predominant tendencies in the way the individual acts, which from the self-evaluating perspective are constituted into positive or negative reactions. Habits are behavior that is normally predictable of an individual in light of certain stimulus, and beliefs are personal consistent ideas accepted as true, these guide thought processes and actions of the individual. In terms of convictions, one notes that this is a terminology that is normally accepted as a variant of belief.

In regards to the unlearning of technical knowledge and methods, it is noteworthy that managers had to stop performing procedures and techniques adopted in the execution of a number of work routines (Table 2).

When it comes to the unlearning of attitudes and habitual modes of action, the content shows itself in the form of behavior adopted in the context of management models that existed in the organizations. These were focused particularly on those concerning management routines of decision making and work team coordination, in addition to habitual modes of relating to higher administration, as shown on Table 3.

Finally, one notes that some managers were also taken to the point of unlearning content that touched on their general belief and convictions, relevant to the modes by which organizations should be managed or reach their final goal (Table 4). Possibly, due to this being a more comprehensive type of knowledge concerning behavioral orientation and therefore, more ingrained, a smaller number of managers have experienced this unlearning.

5.3. What represents unlearning and its relationship with learning

As managers reported their unlearning experiences, a majority also expose their own conception on what unlearning means. Five distinct concepts are identified, which

Table 3. Unlearned attitudes and habitual modes of action

Manager	Unlearning content
Brandon	Manage based on a model with clearly defined practices and procedures Autonomy in the management of working hours for myself and of the team members
Douglas	Work under the direct supervision of company owners Stop having a direct relationship with clients
Gabriel	An excessive benevolent attitude toward coordinated team
Joanna	Manage, in an autonomous fashion, the work team, without having to report occurrences in the area to a superior
Mark	Make decisions in an agile fashion, with the support of a superior, with whom responsibility was shared for the consequences of decisions made
Thomas	Act in a permissive manner with clients, when it comes to the commercial relationship and its compliance with formal terms Behavior in terms of avoiding differences of opinions with co-workers
Walter	Work in an environment where sharing of information and decision making by superiors, were made in an agile and informal manner

Source: Author's own elaboration.

Table 4. Unlearned beliefs and convictions

Manager	Unlearning content
Brandon	Belief in a management model founded on the premise that managers should actively participate in the decision making by the higher administration, and not only execute what is defined by the higher levels
Thomas	The conviction that the way of managing the relationship with the client and the market is based on values of flexibility and negotiation
Teresa	Principles and values concerning the form of promoting education, which establish that the important elements for the learning of a student, cannot be compromised due to reasons of organizational finances

Source: Author's own elaboration.

Table 5. Concepts of unlearning identified from narratives of managers

Unlearning concepts	Managers that express the concept	Conversations that illustrate concept
1. Stop using an old learning and acquire a new one	Arthur, Douglas, Gabriel, Peter, Thomas, and Teresa	"Unlearning does not mean that you do not have any more useful knowledge; on the contrary [...] it means you have given up one thing, but attained something in exchange. As without learning, how do you act?" (Teresa)
2. Stop using an old learning, and if necessary acquire a new one	Charles and Walter	"The move toward unlearning, in reality is you leave on standby that knowledge, without applying it now in light of the situation and learn things, not necessarily, new, but act appropriately along a particular line that has been defined" (Charles)
3. Only stop using an old learning	Martha	Unlearning is "leave behind the use of practices that you think are in line with your beliefs" (Martha)
4. Acquire a new learning, that is worse than the old	Brandon and Peter	"Unlearning can be for the worst. Every change includes a learning; it is at the same time a learning and an unlearning. It is to learn the new and unlearn the old, and the new can be worse than the old" (Peter)
5. To do something new and different	Mark	"Unlearning, I would say is more in the sense of doing something new. Unlearning is not a question of forgetting, it is to do something different to that which you are doing today" (Mark)

Source: Author's own elaboration.

show what is represented by unlearning, as summarized on Table 5. The first concept, according to that which unlearning states about to stop using an old learning and acquire a new one, is it brings as a focal element,

the understanding that the occurrence of unlearning is necessarily related to the acquisition of a new learning. According to that stated through the narratives, to deal with the situations caused by the change,

many managers search for or are taken to actions that are in line with the new way of thinking or acting, in order that they become impelled to stop practicing that element from their knowledge, acquired until that moment.

The second concept, where unlearning is seen as to stop using an old learning and thus find it necessary to acquire another new one, is distinguished from the previous through understanding, expressed by part of the managers, as new learning does not always follow as the unlearning of some acquired content.

Through the reported unlearning situations, one understands that the managers understand that, at times, one already has the domain of learning considered as necessary for dealing with the demands imposed by the situation of change, and as such, there is no new learning related to the unlearning in question.

Regarding the third concept, for which unlearn is only to stop using a particular learning, one notes the understanding from the reports that unlearning deals with the interruption of the use of old learning, an action that does favor the acquisition of new things. On the other hand, the fourth concept identified, in which unlearn involves to acquire a new learning that although is worse than the old, points toward the possibility that unlearning leads to a situation where the new learning, once put into action, is shown to be inappropriate or with attributes inferior to those already used. In this case, unlearning gains a negative connotation and therefore, consists of a situation to be avoided, due to its potential losses, such as the loss of ethical values and useful knowledge.

Finally, the fifth and last concept, which was formulated by the managers, indicates that to unlearn is to do something different and new, and should lead to new ways of thinking and doing things. The emphasis does not fall on to stop using old learning or acquire new learning, but on the necessary personal receptiveness to the changes and their effects.

As one notes, the concepts formulated by the managers tend to indicate that unlearning is related to the acquisition of new learning, and should even influence

the previous knowledge acquired by the individual. Following this line of thought, an understanding was sought into the possible influences of unlearning on the previous learning of managers, where three effects had been observed from the process one over the other.

5.3.1. Effects of unlearning over the old learning

The first effect of unlearning over the old learning was seen in respect to the understanding formulated by the managers (Charles, Douglas, Mark, Martha, and Teresa) where, even though the practice had been abandoned from some previous learning this is maintained as an element of individual knowledge. Through this idea, what was unlearned was not forgotten or lost and can be used again in other situations or work contexts, a process that from the point of view of (Charles) represents a new learning.

Concerning the second effect of unlearning on prior learning, one observes that some of the managers (Brandon and Charles) have the understanding that when unlearning, the stagnation of the process of knowledge improvement began, which for all intent and purpose was the object of unlearning, as to stop following a certain practice or work routine, the manager on equal terms left behind "the continuation in the evolution of the applied knowledge" (Brandon). In these cases, the unlearning content involved information on the strategies adopted by the organization and technical knowledge during the execution of the routine of internal audit.

Finally, keeping in mind that usually, the ways of acting or procedures adopted to perform the work task were substituted by some new ones. The third effect observed shows that the unlearning situation allows managers (all with exception to Douglas) the acquisition of new learning, in the form of new concepts concerning management and its practices (Brandon, Charles, Douglas, Joanna, Laura, Peter, Teresa and Walter), technical management and operations knowledge (Arthur, Charles, Gabriel, Laura, Mark, Peter, and Teresa), abilities in interpersonal relationships and leadership (Joanna, Gabriel and Thomas), and the ability to learn and change their own behaviour (Mark and Peter). Following this line of thought, a majority of

new learning constituted by the managers maintains some link with the subjects that were linked to unlearning, such as occurred with Arthur, for who both unlearning and new learning had as the object the procedures adopted in the process for attending to the client.

The results also indicate that for some managers (Brandon, Laura, and Thomas) the unlearning led to the modification of previous understanding on a particular subject, which not only to stop thinking or acting in accordance with old learnings, but also the modification of the content that constitutes the object of unlearning. This is seen when expressed by Thomas, for who “unlearning of a new concept involves the deconstruction of the old concept”. Another manager Laura states, that after unlearning to perform the work task in an informal manner and learn to do it a documented manner, evaluated that she would not go back to acting as before, due to the gains obtained with the new form of working.

6. Discussion

The previous studies tend to emphasize the role of unlearning in order to facilitate the acquisition of new learning, through the abandoning of the old (Becker, 2005, 2010; Cepeda-Carrión *et al.*, 2011; Hislop *et al.*, 2014). In the present case, the unlearning of managers was not only through the intention of acquiring new learning, but also for ulterior motives, understood as intrinsic elements to the interest of the individual, such as the maintaining of work position and access to opportunities of professional growth. Indeed, one reaches the conclusion that the search to adapt to the prevalent organizational context, with the aim of altering behavior directed toward the operational and management level of work, itself represents the main explanation of managers that decide to put themselves in an unlearning situation.

The analysis of unlearning content of managers indicates the occurrence of the different types of unlearning found in the literature (Hislop *et al.*, 2014; Rushmer and Davies, 2004). However, the interpretations of managers point toward singularities, the like of which bring implications for the conceptualization and definition of the

different types of unlearning, as well as for the determining the elements that trigger the unlearning process.

In regards to the unlearning of routines, Rushmer and Davies (2004) argue that there is an action of new learning over the old, which leads to the weakening or forgetting of such. This dynamic is not identified in the interpretations of managers, through which one notes that the occurrence of unlearning did not primarily depend on the action of new learning and neither the action of forgetting. Hislop *et al.* (2014), in turn, propose that behavioral unlearning starts in events of continual and gradual change. However, one notes that the unlearning of the managers resulted from a sporadic change, or be it, something infrequent that tends to happen in a radical fashion, due to external events or internal alterations to key factors of the organization (Weick and Quinn, 1999).

On the topic of directed unlearning, Rushmer and Davies (2004) argue that there occurs a conscious force to stop acting in a particular fashion, with the aim of eliminating the old learning. However, the managers understand that independent to the unlearned content, they had to make the effort to unlearn, which suggests that this characteristic is not inherent to only one type of unlearning. Also, the experienced unlearning does not lead to loss of previously held learning.

Finally, Rushmer and Davies (2004) suggest that there occurs a type of deep unlearning, which leads to the rupture in the way the individual understands and acts in relation to the environment, therefore, in the same manner as Hislop *et al.* (2014), who consider that cognitive unlearning involves the abandoning of values and assumptions. In this case, the reports from managers converge on the vision proposed by the authors, inclusive in regards to those situations that cause the need for unlearning.

Through this analysis, the authors of this research study identify the occurrence of three types of unlearning, which arise from the experience experienced by the managers in M&A situations. First, the unlearning of technical knowledge and methods, which can be defined by the action of the individual to stop executing technical procedures and

techniques that were adopted in the work routine performance, as well as stop using part of the knowledge that was applied in these routines. In addition, it is understood that this unlearning is caused mainly by changes in work processes and organizational structures, regardless of whether these have originated in continuous or episodic organizational changes.

Second, the unlearning of attitudes and habitual modes of action, involve to breakaway from behaving in accordance with the usual ways of thinking and acting, that are incorporated into the way that work is performed, problems are resolved and decisions are made. This is caused in principal through changes in the management model and organizational culture.

Finally, the third, the unlearning of beliefs and convictions, in turn, concerns the stopping of behavior that conforms to comprehensive and consistent ideas and opinions that in general guide thinking and action. This is due, in particular, to radical changes in the management model and in the organizational culture.

In line with this, one notes that the type of unlearning experienced contributes to the creation, on the part of the managers, of what represents unlearning. The authors Cepeda-Carrión *et al.* (2011) understand that in a favorable context, unlearning should initially, interrupt the habitual form of acting on the part of individuals, in order that these can recognize new ways of thinking, and in sequence develop new mental models. The results from this study, albeit, suggest that this process does not occur in a planned and compartmentalized way in the absolute sense, due to the fact that when the reports from the managers that have unlearned are analyzed, one notes that the choice to unlearn resulted in some way from the contextual demands of new proposals.

This shows that before searching to unlearn something from their behavior, first the managers were confronted with new aspects present in the environment, which had to be learned and practiced. It should be emphasized, however, that the question regarding the sequence of the occurrence of unlearning and learning events is given little discussion in the literature. Even though the

definitions and models found suggest that unlearning follows new learning, before the understanding that prior to learning new content it is necessary beforehand to eliminate the barriers represented by old learning (Becker, 2005, 2010).

The appropriation of the idea of unlearning by the investigations in administration and organizations took into account in particular the understanding that unlearning would contribute, through the psychological mechanism of extinction, to suppress previously learned responses to individual behavior (Hedberg, 1981). Given that the importance attributed to this extinction is due to the consideration that it contributes to impeding the individual from persevering behavior that is no longer seen as adequate to the current reality or even harmful (Izquierdo, 2015), is believed to have spread the notion that unlearning in organizations would involve the notion of discarding knowledge classified as inferior or inefficient to that which it intends to incorporate (Hedberg, 1981; Nystrom and Starbuck, 1984) or that it would prevent an improvement to individual performance (Cegarra-Navarro and Rodrigo-Moya, 2004).

Nevertheless, from the point of view of the individuals of this research, one understands that unlearning does not necessarily open the way for the acquisition of knowledge, taken as better or more adequate to the behavior and the performance in the work place. This aspect still highlights the contextual attribute of unlearning, in the sense that the importance of new learning is attributed through the perspective of the strategies and organizational needs (Becker, 2010; Cepeda-Carrión *et al.*, 2011; Tsang and Zahra, 2008), even if these, as already seen in some cases in this study, are evaluated as inadequate or negative by the individuals that are impelled to unlearn.

Thus, the authors of this study argue that the unlearning of managers - circumscribed to the situations of change due to an M&A - can be defined as the process through which the individual, in a deliberate sense, interrupts the practice of previous learning, under the proposal of adapting to a situation of change, which may demand or not the acquisition of new learning. The proposition of such a definition is based on

the assumption that unlearning involves the adoption of a behavior, or be it, the adoption of a mode of acting, in response to a demand of the context in which the individuals find themselves inserted (Lefrançois, 2012).

As unlearning occurs through the understanding formulated by the individual on how to react to situations that can demand that one stops acting in a particular manner, such as normally occurs in organizational environments under change, it is considered as an action taken deliberately by the individual. As reported by the participants of the research study, before an event that demands the adoption of behavior different to that to what they are used to, the individual decides how to react - in the case of managers, many opt for unlearning.

The reference to unlearning as the interruption of the practice of previous learnings, adequately reflects the interpretations of the managers, in spite of the understanding that the content of unlearning is not eliminated from individual knowledge and can be practiced again in other situations or contexts of work. Considering that the definitions of the concepts found in the literature are still shown to be ambiguous (Akgün, Byrne, Lynn, and Keskin, 2007; Hislop *et al.*, 2014; Tsang and Zahra, 2008), the authors of this study understand that the proposed definition contributes to circumscribe, in a more precise manner, the mechanism of unlearning, in contrast to the approaches that delimit by means of ideas, such as discard, abandon or forget.

Through the suggested definition, the first proposal of unlearning is shown through the adaptation to the organizational context during a period of change, contrary to approaches that tend to emphasize that the finality of unlearning, on an individual level, is to facilitate the acquisition of new learning (Becker, 2005) or favor the substitution of previous learning (Cepeda-Carrión *et al.*, 2011). Nevertheless, once unlearning collaborates in the mitigation of obstacles constituted in the form of psychological attitudes of clinging onto old knowledge and resistance to putting oneself into effective unlearning situations, its occurrence creates an environment apt to the acquisition of new learning, if this is found necessary. Furthermore, as pointed out by the results of

the research, not all the managers that went through unlearning acquired new learning, as in the fact that not all unlearning leads to the acquisition of new learning related to the unlearned content.

Therefore, it is emphasized that the condition of change on the grounds through which unlearning is given can demand or not the acquisition of new learning, given that in some cases, the individual can possess beforehand, the knowledge that will be put into practice in place of that that has been unlearned. In other situations, the individual may only be deactivated from the activities that they developed or in the context of how they performed certain activities, which may demand only, the interruption of something in terms of the habitual mode through which it was performed.

From this perspective, the purpose for which unlearning will be considered in those processes of change will depend on the scope of the behavioral change seen as necessary and from the types of new learning that this change implies. This therefore requires the identification of situations where the incentive to unlearn is placed as a condition for the acquisition of new learning, as in the cases where changes in individual understanding become necessary, and which demand a more complex process of learning.

7. Conclusions

The findings of this study extend on previous studies concerning individual unlearning by means of their three main results. First, to outline the types of unlearning of managers in situations of organizational change, the authors of this study understand that the different forms of unlearning on the individual level occur, to a certain extent, from the levels of organizational change to which they are associated. Such a comprehension contributes to the advance of the understanding of configurations taken by unlearning in situations of change, and in practical terms, this can be taken as an indication for the planning and implementation of mechanisms that break resistance to change.

Second, the results show that the unlearning of managers in situations of

change do not occur by means of a process with steps that are necessarily compartmental and successive, for which the initial step is represented by the interruption of behavioral habits (Cepeda-Carrión *et al.*, 2011). The authors of this study, in accordance with the findings, suggest that unlearning on its individual level covers the simultaneous trail of different steps, which are represented by finding the need to change something in behavior, search for new learnings (if necessary) and the interruption of the practice of old learnings.

Third, the authors of this study offer a conceptual definition for the unlearning of managers in M&A situations, which can serve as a parameter for investigations directed toward the analysis and deeper understanding into the nature of the phenomenon, in similar organizational situations. In view of the fact that indications toward the definition of the concept found in the literature, still shows ambiguity (Akgün *et al.*, 2007; Hislop *et al.*, 2014; Tsang and Zahra, 2008), the perspective offered by the authors of this work is seen as contributing to a more precise circumscription of the mechanism of unlearning, in contrast to approaches that delimit through ideas such as disposal, neglect or forgetfulness.

Also, the results of this study bring theoretical and practical implications to the learning of managers. The understanding that unlearning facilitates the breaking down of the barriers constructed in the form of attitudes of clinging to old knowledge and facilitates learning that has the aim of promoting the change of previous individual understanding, brings as a consequence the importance of the consideration concerning this mechanism in its relationship to formal learning processes and in the place of work.

In the perspective of those practicing such, this means understanding and establishing forms through which unlearning can be contemplated in actions of training and development of individuals, as in the programs of management and leadership development, along with coaching and mentoring practices. Given that unlearning also represented the means by which managers sought to adapt to the ongoing changes in the organization, the results indicate that the institutionalization

of actions aimed at promoting unlearning, in processes of organizational change, can contribute to the achievement of the desired effects on corporate goals.

As the principal limitations of this study, the authors point to the restrictions arising from the narrative process and the interviews, which can lead to the omission of information, as well as to the distortion of the said. In addition, there is the possibility of generalization of results, due to the discussion having been performed from data collected by means of only a single source, as well as by the selection of candidates through convenience of the subjects, and who, in this fashion are not representative of any management population.

Finally, for the development of future studies, the suggestion is made that investigations aimed at the identification of the individual and organizational means that can facilitate individual awareness on the importance of unlearning something, along with those that favor the practice of unlearning by organizational members. On equal footing, future studies could search for an understanding into the effect of the insertion of actions aimed at unlearning through management education programs, a direction through which it is believed possible to capture the impact of unlearning concerning knowledge and learning in a longitudinal perspective.

In this research, unlearning situations were analyzed regarding previous learning useful or appropriate to the context, which even after they were unlearned, were kept in the individual knowledge structure. As such, for future investigations there remains the challenge of understanding how unlearning can be operated in situations of the acquisition and use of knowledge that suffers interference from learners or from previously developed preferences, which generally act automatically or unconsciously and admittedly cause negative or undesirable results.

This is the case with erroneous learning (Mager, 1961), where the individuals learn something in a wrong way, due to aspects such as insufficient previous learning and a lack of concentration, as well as superstitious

learnings, where the interpretation of the learning experience leads to the mistaken understanding of the relationship between the action and the result (Levitt and March, 1995). As well as the action of perceptual biases and evaluation of problems that are present in the decision making, arising from heuristics, that is, shortcuts or simplifying mental strategies used to solve a problem. For this reason, the suggestion is put forward for carrying out studies that seek to understand how, through unlearning, such cognitive elements can be identified and their practice interrupted, in order to favor the accommodation of knowledge appropriate to individual action.

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