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Unravelling the relational processes involved in the co-construction of strategic organisational memory: insights from a multinational bank.

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Research in organisational memory studies has illuminated the ways that organisations shape, and are shaped by, remembering and forgetting (Foroughi et al., 2020). However, recent work by (Coraiola et al., 2023) has called for research that focuses on the multiple mnemonic communities with organisations. This paper answers that call by analyses the process of memory construction at a multinational bank during a period of organisational crisis. Using 21 interviews, we show how the corporate archivists and the senior management team, theorised as different mnemonic communities, collaborated to construct organisational memory in the form of a historical narrative that was acceptable to both mnemonic communities and to the wider organisation. This study contributes to organisational memory studies theory by showing the importance of taking both an interpretive and functionalist perspective when researching memory; and contributes empirically by producing a process model that shows the memory construction in practice, and by highlighting the organisational power relations that can affect how this process unfolds.

Keywords:

Organisational memory; rhetorical history; corporate archives; power; mnemonic communities

Introduction

Organisational Memory Studies (OMS) research focuses on the "ways that organisations and organizing processes shape, and are shaped by, remembering and forgetting" (Foroughi et al., 2020, p. 1736). However, what requires greater attention is developing an understanding of the process of memory construction and how this is used to by organisations to help them achieve their strategic objectives. This study addresses this lacuna by examining the

production of historical narratives as a way to create a usable or material form of memory. Researchers have shown that organisational memory in the form of historical narratives are used in many ways, including invoking the memory of deceased firm founders to try to inspire employees (Basque & Langley, 2018), in appeals to stakeholders to support risky entrepreneurial ventures (Suddaby et al., 2021), to enhance legitimacy in contested industries (Smith et al., 2022) and in marketing to consumers (Foster et al., 2011). Therefore, we know that organisations see value in evoking memory and constructing historical narratives to pursue strategic goals, but less is known about how this occurs in practice. We know *why* memory is a crucial resource for organisations, but less is known about *how* it is mobilised, utilised, and constructed.

To address this gap our paper explores how corporate archivists and members of the senior management team (SMT) at Barclays collaborate over the construction of memory by analysing data from a four-year, research council funded study of the corporate archives of the multinational bank, Barclays PLC. This paper unravels the complex process of co-creation between the archivists and the SMT, by identifying who is responsible for driving the different stages of the process, and evidencing how static memory converts into dynamic memory through the production of historical narratives (Corbett et al., 2018). These findings contribute to OM literature by creating a process model that shows how multiple stakeholders collaborate in the construction of memory and the co-creation of historical narratives designed to help organisations achieve its strategic goals. Our process model also shows how over the memory construction process shifts as it plays out, demonstrating power relations during collaborative memory construction between mnemonic communities.

Our case study is centred on a period of organisational crisis, beginning in 2008 and culminating in 2012 when Barclays management constructed historical narratives designed to reconfigure the organisational culture and engaged in what Gehman, Trevino, and Garud

(2013) call values work. During this period, which followed a series of ethical and legal scandals, the bank's leaders called on Barclays' employees to embrace a set of values which evoked memories of the moral code of the bank's Quaker founders. This process required the close collaboration between the archivists and the SMT in order to construct a narrative that could help deliver the SMT's strategic goals, while also satisfying the professional ethics of the archivists by staying accurate to the historical records held at Barclays Group Archives (BGA). In addition, the involvement of corporate archivists in the co-creation of these narratives was designed to give the narrative a greater degree of perceived authenticity (Carroll & Wheaton, 2009; Hatch & Schultz, 2017) and archival reliability (Duranti, 1995). This study will demonstrate the interactions between different stakeholders in construction of memory and the function of the corporate archive in facilitating the production of strategic historical narratives.

Research on the content of historical narratives and how they are used is abundant (Suddaby et al., 2010; Wadhwani et al., 2018). However, with few exceptions (Foster et al., 2020), there is little research on the specific processes through which organisations produce historical narratives when undertaking memory work. Further research is required to understand what stakeholders are involved in the creation of organisational memory, their roles and function, and, ultimately, how memory is produced, constructed and employed. This study will examine the connections between the individuals in firms who are most heavily involved in the preservation of static memory (such as archives, artefacts and documents that record the past) and those individuals involved in the production of such narratives that form dynamic memory, which is the "living" memory constructed by people and shared through their stories (Corbett et al., 2018). Whilst memory exists in static form in the archives, documents and minds of organisational stakeholders, it can only be mobilised for strategic purposes when it makes the shift to dynamic memory and is articulated, in this case, in the form of an historical

narrative. This study will demonstrate this process in action and respond to Coraiola et al.'s (2023) call to understand how mnemonic communities organize memories between each other.

To date, much of the rhetorical history research tends to view the construction of organisational memory as an pursuit designed and managed by SMT in large organisations (Maclean et al., 2018; Suddaby et al., 2010). While memory studies has viewed memory construction as a fragmented phenomenon that takes place within the context of larger groups (Feldman & Feldman, 2006; Rowlinson et al., 2010), the relational dimensions between different mnemonic communities – in our case corporate archivists and the SMT – has not been examined. Our study positions memory production as a relational process which engages multiple stakeholders across mnemonic communities (Coraiola et al., 2023) who collaborate in order to achieve targeted strategic objectives. This study demonstrates how archivists, as a distinct professional class within large organisations who have their own professional education and training, professional bodies, and professional codes of ethics (Hardman et al., 2008; Strickland, 2017a), are mobilised by the SMT to recall memory and craft historical narratives in a collaborative process. Our case study demonstrates how the construction of memory is a collaborative process between corporate archivists and senior managers.

The paper is structured as follows: first the paper will review the literature on OMS, rhetorical history, and how they relate to the use of corporate archives. The paper will then give an overview of the research context of Barclays before discussing our data and methodology for the study. Following this section, the paper will present our findings and process model. The paper will then discuss our findings that show how our study expands current theory and contributes to a better understanding of organisational memory construction, directions for future research, and limitations before concluding with the implications of our study.

Literature Review

There is now a substantial body of literature in management on organisational memory work (Foroughi et al., 2020). The influential work by Walsh and Ungson (1991) focused on how memory was preserved, accessesd and deployed for specific organiational purposes, with memory being held in various "retention bins" such as employees, structures, and organisational culture. This functional perspective (Foroughi et al., 2020) is built on Walsh and Ungson's work (Anderson & Sun, 2010), with their ideas used to look at how organisational memory affect such things as knowledge transfer and organisational unlearning (Tsang, 2008), operational excellence at the cost of diminshing adabtability (Jain, 2017), the role of rituals in the maintenance of institutions (Dacin et al., 2010), and the effects of organisational structure on organisational memory and the various retention bins (Fiedler & Welpe, 2010). These works show the processes of remembering within organisations, focusing on the storage and retrieval of memory rather than how it is constructed.

Other work on organisational memory takes an interpretative and social constructionist perspective, emphasising human creativity and managerial agency (Rowlinson et al., 2010). Building on the work of Feldman and Feldman (2006), Rowlinson et al. (2010) called on management academics who study organisational memory to adopt a 'collective memory' approach, similar to that now dominant in social memory studies (Barndt, 2007; Cutcher et al., 2019; Rowlinson, 2002; Zerubavel, 2003). Interpretivist approaches often focus on narratives within organisations (Czarniawska, 1997), perceiving memory and history not as something that exists objectively and impacts an organisation, but as something that can be revised and reinterpreted in different ways at different times (Feldman & Feldman, 2006). Although this reinterpretation can often take the form of narratives, scholars have also examined the role of memorialisation and artwork as a form of narrative memory (Barnes & Newton, 2017, 2018; Bell & Taylor, 2016). However, how individuals interpret the past and shape these narratives,

and what they choose to forget is affected by the mnemonic communities that they are part of (Mena et al., 2016; Zerubavel, 2003).

While the majority of these studies have focused on memory within a mnemonic community, Coraiola et al. (2023, p. 378) have called for an "open-systems approach" that looks at how different mnemonic groups operate within a broader network of mnemonic communities. Indeed, rather than "looking at an organisation as a homogenous mnemonic community" scholars should "look inside and focus instead on the relationship between various mnemonic communities that constitute an organisation" (Coraiola et al., 2023, p. 384). Our study looks at how two different mnemonic communities – corporate archivists and the SMT – worked together to construct organisational memory with the winder mnemonic community of Barclays.

The functionalist and interprativist approaches have often stood apart from one another, with functionalist perspective criticised for ignoring the pluarility of voices and interpretations that are part of the process of constructing memory (Foroughi 2020; Smith and Russell 2016) as shown by Parker (2002) and Linde (2009). Meanwhile, interprativist approaches can overlook the processes that underping the creation of narratives as well as the sites of memory being studied (Rowlinson et al., 2010). Corbet et al.'s (2018) identification of two memory types, static memory – being that which is held in documents and records – and dynamic memory – understood and told by people – does suggest that that both a functionalist and interprativist perspective is necissary to understand how organisational memory is constrcuted and disseminated. However, the process by which memory is transformed from one type to another is not articulated, a process that this paper will show.

One strand of OMS research that is particularly relevant to this research focuses on how memory is articulated through the construction of historical narratives which are subsequently

used by SMTs to reinforce or change the values of organisations . Researchers have shown that organisational memory is evoked by organisations to promote and reinforce a particular set of values. For instance, Cailluet et al.'s (2018, p. 1820) study of the French charity Emmaus shows that senior managers evoke the memory of the organisation's legendary founder, the Catholic priest and Capuchin friar Abbé Pierre, to encourage the staff to practice "charity, kindness, simplicity, integrity." Maclean et al. (2018) shows how managers at Procter & Gamble reinterpret the past as it transitioned from a multinational to a global organisation, making greater use of its archives to provide the history that managers could then use to socialise employees and invent traditions and a shared culture.

How organisation's use historical narratives for strategic purposes has received significant interest from researchers since Rowlinson and Hassard (2023) identified a "historic turn" in organisation studies. Suddaby et al.'s (2010) paper on rhetorical history argued that managers use history to persuade stakeholders and so secure a competitive advantage, building on his earlier work that showed how historical narratives were used to enact or prevent institutional change (Suddaby & Greenwood, 2005). While not the first papers to examine how organisations reinterpret and use their pasts, (see Ooi, 2002; Rowlinson & Hassard, 1993; Taylor & Freer, 2002), the idea of rhetorical history and uses of the past have been influential in organisation studies (Wilson et al., 2022).

While these studies show the value in using historical narratives to construct, reinforce, or change corporate values, there is a tendency in this OMS literature to conflate the concepts of history and memory As Decker et al. (2021, p. 1128) point out, much recent research on history in organisation studies "elides the difference between memory and the past." Historical research as practiced by historians creates accounts of the past authored by identifiable historians "whose interpretations are verified through direct references to the underlying sources;" conversely, collective memory is socially and organisationally negotiated with

multiple unnamed authors “and evaluated in terms of how authentic it appears within a given socio-historical context” (Decker et al., 2021, p. 1145). This differentiation is important when considering the co-construction of memory as different mnemonic communities will have different understandings of how to research the past or, alternatively, have specific strategic objectives that direct them towards one approach over another in both research and presentation. How these individuals work together to co-construct historical narratives and disseminate these within an organisation despite differences in relative organisational power has received little attention (Coraiola et al., 2023). Our focus on how the memory is constructed, rather than the uses it was then put to positions our work within OMS rather than rhetorical history or uses of the past.

There has been a lack of attention to the processes by which historical narratives are produced in organisations and, relatedly, the individuals within large organisations who specialize in the production of such narratives. While there has been some attention paid to corporate museums and their curators (Blagoev et al., 2018; Nissley & Casey, 2002; Ravasi et al., 2019) far less attention has been has been paid to corporate archivists outside of the discipline of archival studies. This lack of attention is unfortunate because the production of credible historical narratives within organisations requires serious mental effort, time, and other resources as well as often being a collaborative process that often includes corporate archivists (Hannah, 2017; Hatch & Schultz, 2017; Lasewicz, 2017; Markley, 2008). Indeed, archival studies literature makes it clear that corporate archivists are often involved in the creation of corporate historical narratives (Mitchell 1989; Bieri 2012; Hardman, Sienkiewicz, and Strickland 2008; Strickland 2017b) even if their role as both employee and historian creates difficulties (Loew, 2015).

The few studies that do focus on corporate archives rarely show how they interact with other departments within the same organisation from multiple actors’ perspectives. Foster et al.’s (2020) study does focus on corporate archivists and their work and does mention that

"corporate archivist acts as a strategic partner with the marketing division, corporate legal counsel, and/or strategic planning group" (Foster et al., 2020, p. 219); but it does not feature any interviews with others within the organisations where they work and therefore cannot show us any processes of co-creating memory or historical narratives between mnemonic communities. Likewise, Adorisio (2014) interviews the creators of organisational historical narratives, but focuses on the narratives themselves and how individuals construct their memories rather than any processes of co-creation. Fan and Liu (Fan & Liu, 2022) look at archives from the perspective of secrecy, focusing on "archival stories" and their potential to conceal what happened rather than illuminate it. However, this study relies on secondary sources and does not clarify what activities the archivists actually undertook that led to this concealment, how different mnemonic communities interact to construct these stories, and does not differentiate between public archives and private archives which are set up and operated for distinctly different reasons and in different ways (Logan, 2017). Only Popp and Fellman (2020) focus on the multiple parties that use corporate archives for their own purposes, highlighting the unequal and shifting power dynamics between the various groups. Considering the polyphonic nature of internal understandings of an organisation's history (Foroughi, 2020; Linde, 2009; Smith & Russell, 2016), this lack of attention on how organisations attempt to mobilize various mnemonic communities to co-construct a singular, coherent, and acceptable organisational historical narrative and how the power relations actually play out creates a gap in our understanding of organisational memory.

This lack of attention on corporate archivists has also meant scholars have concentrated more on the memories that individuals construct but not how they access information to construct these memories. While rhetorical history scholars have noted things like corporate biographies, speeches, and paintings can be sources of knowledge for later narrative construction (Barnes & Newton, 2017; Maclean et al., 2018; Schultz et al., 2006), they have also often overlooked

how these sources are preserved and later accessed by those who use them. Our study highlights these individuals and the processes that convert static memory into dynamic memory and back again.

To understand how mnemonic communities cooperate to construct organisational memory we draw on findings from our multi-year study of the work of corporate archives department of one of the United Kingdom's oldest and most important banks, Barclays. Our findings will help OMS scholars to understand the role of the corporate archivists in the process of memory construction, how different mnemonic communities collaborate to co-construct organisational memory, and provide a process model for how this process unfolds at a multinational bank. In the next section, we describe the overall project and the nature of the data and methods we have used to address the research question identified in the in first paragraph of this paper.

Methodology and research context

Research context: Barclays bank and Barclays Group Archives

The Barclays Group plc is a multinational bank holding company headquartered in London. As of 2021, 47,686 or 55% of its worldwide workforce were employed by the firm's UK subsidiaries, which include Barclays Bank plc, its main retail banking subsidiary. Barclays Group, one of the largest banks in the United Kingdom, employed 47,686 thousand. The bank's workforce includes approximately 21,000 workers in India, roughly 10,000 in the United States, and small numbers in other countries. Barclays plc operate subsidiaries in 40 countries.

As noted above, our focus is on understanding how corporate archivists work with other colleagues to produce historical narratives in organisations. We theorize the archivists as a distinct mnemonic community within the wider community of Barclays. The corporate archivists at BGA are professionally trained archivists who have experience working in other archives, have specific expertise, who have received a university masters level education

specific to the role, have professional associations, and a profession wide code of ethics (Procter, 2017; Turton, 2017). While the SMT members are from a wider variety of educational and professional backgrounds, we theorize them as a singular group due to the demands of their positions within the company. SMT member will bring their own mnemonic practices to the group based on the other communities they are part of (Zerubavel, 2003). However, as they are all tasked with the same objective - the strategic direction of the organisation – we theorize them as a single mnemonic community within the bank.

BGA is a distinct department which is organisationally part of the Corporate Secretariat. BGA was created in 1989 when Barclays consolidated its collections of historical documents into a site in Greater Manchester and employed a professional archivist to organize them. BGA is tasked with preserving the records of Barclays and its predecessor banks dating from 1567 to the present. Its purpose-built, air-conditioned strong rooms contains approximately two miles of shelving, preserving records and other artefacts such as uniforms and artwork (Barnes & Newton, 2022). BGA's current mission is "to protect and preserve the Group's [Barclays] Corporate Memory [sic]" (Barclays Group Archives, 2018) which includes things such as Board Minutes and the records of Barclays Corporate Secretariat (BCS) which must be preserved. However, records and artefacts from other departments that are considered to have ongoing value or be historically significant can also be preserved at the discretion of the archivists.

BGA's work tends to fall into two categories: known item requests, where users ask for retrieval of a specific item or record such as a copy of specific document; and subject requests where a user asks for information on a general subject which then requires the archivists to engage in extensive research of the type that underpinned the historical narratives discussed in our main case study. The majority of internal enquiries are known item requests, with copies of terms and conditions for products sold by the bank the most common request. For example,,

in 2018 330 of the total 491 internal enquiries, 67 per cent, were known item requests and 98 of these requests, 28 per cent, were for terms and conditions of various products sold by the bank. Regarding the records preserved at BGA, Barclays do have departmental procedures for when information is sent to the archive. However, only one interviewee of the 19 non-archivists Barclays employees were aware of how and when records were sent to BGA. Hence, the capturing of records for preservation at BGA is a mix of passive accumulation through organisational policy and sporadic active accumulation through the activities of the archivists at BGA.

The history of Barclays and the Transform Programme

The organisation that would become Barclays was created in 1692 by two Quaker goldsmiths, with the first Barclay, James Barclays, joining the partnership in 1733. In 1896 the partnership merged with 12 other banks, mostly Quaker owned or Quaker founded, to form a joint stock bank with the name of Barclays (Ackrill & Hannah, 2001). Over the course of the nineteenth and twentieth centuries, the firm that bears the name of Barclays merged with many other British banks to form a nationwide banking chain, with the brand names of the predecessor banks disappearing from public view. In the twentieth century, the bank evolved into a multinational with subsidiaries around the world, particularly in the former British Empire. Following the deregulation of the British financial sector in 1986, Barclays shifted its focus from retail banking into the riskier area of investment banking. Furthermore, as in most British financial institutions, Barclays' culture became more entrepreneurial and risk-tolerant in the 1980s following the "Big Bang" deregulation of the London Stock Exchange and its entry into investment banking (Augar, 2018).

This shift in the organisational culture was later associated with the series of decisions that brought the bank to the brink of collapse during the Global Financial Crisis and which were at the centre of a number of scandals (Salz & Collins, 2013). There was also a growing sense that

the bank had lost touch with the values of its Quaker founders, with a journalist in the Financial Times remarking that "the sober values of the…Quaker families that helped turn it into a great national institution over 300 or so years now seem remote" (Plender, 2012). While the banking sector as a whole lost public in the aftermath of the financial crisis, Barclays and its controversial CEO Bob Diamond stood out as a particularly corrupt and objectionable, with Diamond being christened the "unacceptable face of British banking" (Sylvester et al., 2010; Treanor, 2010; Treasury Select Committee, 2012). Stakeholders came to associate the bank with dishonesty, fraud, and socially parasitical activities that did not contribute to the real economy particularly in relation to how it treated its retail customers (Dyson, 2009; "Politicians welcome Diamond's departure," 2012).

In August 2012, following the LIBOR rigging rate scandal that cost Barclays both its CEO and Chairman over one 24-hour period (Daniel Schäfer and Caroline Binham, 2012; FSA, 2012; Treanor, 2012), the board of Barclays appointed Antony Jenkins as CEO with a mandate to reform Barclays and restore its social licence to operate (Patrick Jenkins, 2012a; Patrick Jenkins & Arnold, 2015). Jenkins, who served in that role until his dismissal in July 2015 wanted to promote a new moral code and corporate culture within the bank that would discourage on the unethical behaviour associated with his predecessor as well as overhauling the operations of the bank, in particular its investment banking operations (Daily Telegraph, 2013; A. Jenkins, 2013, 17 January 2013). One of Jenkins first acts was to announce an independent review, headed by lawyer and finance industry veteran Antony Salz (Patrick Jenkins, 2012b; Salz & Collins, 2013). In December Jenkins would launch his Transform Programme, and internal programme that used the bank's history, amongst other resources, in an attempt to construct a new corporate culture for the organisation (A. Jenkins, 2013; P. Jenkins & Saigol, 2013). This drive to change the bank's culture would become identified with

Jenkins personally, with critics within the bank ironically referring to him as “Saint Antony” (Financial Times, 2015).

Methods

Our study of the work of the archivists of Barclays included semi-structured interviews and direct observation of their work. One author was embedded in the bank’s archive spending a total of 912 hours in the corporate archive, averaging one day per week across three years, with the visits supplemented by memos of approximately one A4 page per visit. During this period, the researcher participated in the archive’s new employee training programme and spent two weeks cataloguing new documents that have been accepted into the archives in order to understand the work of the archivists. The researcher was also given office space in the archives and was able to directly observe the day-to-day work activities of the archivists.

Interviews were conducted with 20 individuals in the bank who had worked with the bank’s archivists to co-create historical narratives, one of the archivists at BGA, and the Group Archivists at BGA who also oversees the operation of the department. Interviewees were identified examining the enquiry records created by the archivists, through conversations with the archivists, and by applying snowball sampling and requesting that interviewees recommend others who may have pertinent information for the research. Interviewees included the former CEO, board-level executives, middle managers, archivists, and other non-archivists. Many of these interview informants clearly fall into the category of elite informants, with some falling into the category of ultra-elite (Stephens, 2007), and the interviews were conducted according to what the literature suggests is the best practice for gaining knowledge from elite informants (Aguinis & Solarino, 2019; Solarino & Aguinis, 2020).

The interviews were semi-structured, with a general interview schedule that would be adapted depending on the interviewee’s role at the bank and interactions with the archive. The interview schedules and protocols were vetted by a university research ethics committee in advance of

the start of our data collection. The interviews were recorded and transcribed, lasting an average of 41 minutes with the longest being 61 minutes in length and the shortest being 19 minutes. 18 of the interviews were conducted face-to-face, with the remaining three conducted via phone.

Interviews were triangulated with other data, such as documents captured by the archives created during the Transform Programme, and documents created by the archives to measure its own performance. Additionally, other materials were used to understand the context of the Transform Programme, including contemporary and historical operational documents and publicly available sources such as newspapers, speeches, and press releases by Barclays. These were predominately digital files, numbering 159 individual files, containing 511 pages of documents. This dataset allowed the researchers to analyse the processes of narrative construction from beginning to end, observing the tensions between different cohorts of professionals, and understanding how the process of memory co-construction influenced the end product and therefore the resulting memory that was disseminated.

Insert Table 1 about here.

Data Analysis

The interviews were transcribed and then coded using NVivo, with the first round of coding being open coding (Saldana, 2016, pp. 100–105). This first round generated themes that were then integrated into the second round of coding which took the form of eclectic coding, which combined values, descriptive, and thematic coding; for this paper it was the thematic coding that was most relevant. These approaches to coding enabled the identification of the

interviewees' motivation for working with the firm's archivists. The transcripts were then coded a third time, this stage focusing specifically on the themes that had been generated during the second round. These themes included: memory, research, history, value(s), collaboration, partnership, Quakers, process, and evidence. The final stage was 'codeweaving,' integrating the various codes into a narrative structure to make sense of them, connect them more abstractly, generate insights, and make the findings more explainable to others (Saldana, 2016, p. 276).

As the interview transcripts were then uploaded to NVivo for analysis each co-author had access to the interview transcripts and engaged in a highly iterative process during which they carefully discussed, debated, and challenged each other's interpretations of the interview data. Although there were no major disagreements about how to analyse the interview data, this process of discussing the competing interpretations improved the accuracy of the findings and the overall confidence that the data was interpreted correctly.

Findings

Using the Transform Programme as a case study, we have identified a process model that occurs when archivists and other professionals collaborate to co-create memory (see Figure 1). The model shows the steps of the process and positions them according as they convert static memory to dynamic memory and back again. The vertical axis measures the level of control a party has over that stage, whether its Barclays non-archivist employees or the archivist who have the most control at that stage. While this is a collaborative process, the parties involved have different levels of control over the various stages due to their skillsets, positions within the bank, and the responsibilities if their roles. The solid lines indicate paths to the next stage that always happen for memory construction process to be completed; the dashed line indicates the transition from one stage to another that does not always happen or need to happen for the successful completion of memory construction but would ideally take

place to facilitate future memory construction activities. This section will then discuss how the process plays out throughout the Transform Programme and how the process of co-creation occurred chronologically in this instance.

Insert Figure 1 about here.

Capturing

For a corporate archive to be of use in the process of memory construction then the process of *capturing* static memory, in the form of records and/or artefacts, must take place. This process is a process in itself of various functions, such as identifying departments or records of interest, assessing these records for their potential value, preserving them if they are fragile, and accessioning them into the archive and making records of them in the archive's finding devices such as its catalogue. Although a process that goes largely unseen by future users of the archive, this is a crucial stage in constructing an archive that is in anyway valuable for future users (Wiltshire, 2017). As BGA had been in operation since 1989, much of the *capturing* of records necessary for the memory work required in the Transform Programme had already taken place. As noted above, BGA are mandated to collect and preserve certain types of records that are legally required to be preserved such as Board Minutes. As the Group Archivist states:

> We try to collect records that Barclays creates in the course of being a bank and it's not our job to create records. What we're doing is we are collecting the records that are created as a natural process as part of the bank carrying on its business and we are looking to collect records that show what the bank was doing and why it was doing it, how did it do it, what impact did that have.

However, other types of records and artefacts are left up to the discretion of the archivists, with their guidance being that their purpose – both the archivists and the records that are preserved

– is to serve the bank. Indeed, while uncommon BGA's archivists do still visit departments to assess which records should be captured as part of Barclays organisational memory. As mentioned, few employees at Barclays outside of the archivists appear to be aware of how records make it into BGA which makes the archivists crucial in ensuring that records are captured for the archive, ensuring they are correctly catalogued to enable future use, gives them a powerful role in determining how the archive is to be constructed. It is at this stage that the static memory is captured and preserved for future use. However, as the capturing process relies so heavily on a mix of obscure processes and the work of the archivists, it is inevitable that only a fraction of records created are ever assessed for accession into the archive (Harris, 2002).

Enquiring

The next stage in the co-creation of memory is *enquiring* when someone – in the case of the Transform Programme another employee of Barclays –contact BGA and make an enquiry. In 2012, Jenkins initiated the Transform Programme, beginning at the same time as the Salz review, with both Jenkins and the Salz Review identified Barclays' lack of purpose and drift away from its founding principles as problems that needed to be solved (A. Jenkins, 17 January 2013; Salz & Collins, 2013). The Transform Programme was launched in December 2012, with the research underpinning it happening in the months before that, and would the corporate purpose the program espoused, "Becoming the Go-To Bank" would remain Barclays stated purpose until 2018 where it would officially change to "Creating Opportunities to Rise."

In order to create a new set of corporate values that would guide the corporate culture, the former CEO initiated a series of nearly 2000 interviews with Barclays employees as he "didn't want these values to be handed down from on high." However, the CEO also saw Barclays' past as crucial "to try and figure out what was in our DNA," and therefore tasked BGA with researching the bank's history and identifying events that showed its core values. It was important to Jenkins that Barclays:

> [L]ook back through the history of the organisation to try and figure out what was in our DNA if you like and that was a valuable input and again valuable context people because I want to be able to feel like they were part of something bigger than themselves […] to give that that sense of something that was bigger than any one individual.

Through using BGA, the Director of the Barclays corporate Communication sought to identify the "enduring values that were consistent with the values they had, the Quaker values, right back to the establishment of the firm" and "to find stuff that we could quote from that various ancestor stewards of this business within the communications campaign and support about new purpose and values." Indeed, for the CEO the archives were crucial in shaping stakeholders' interpretation of the bank:

> It was important for people to understand […] the institution […] they believe that the bank had become incredibly self-serving and for most of its history that was not the case now it was a for-profit organisation, and it was never any sense that making money was wrong and I don't believe making money is wrong but how you make money that's the important thing.

It is the *enquiring* stage where the process of converting static memory to dynamic memory begins as it the instance where memory retrieval is being requested as, for whatever reason, the current dynamic memory within the organisation is not sufficient. In the case of the Transform Programme, the dynamic memory held at Barclays in 2012 contained information on the bank's Quaker founders, but not enough information to be able to construct a narrative that would underpinning the bank's new set of corporate values or corporate culture. Hence, existing memories could direct the enquiry, but its insufficiencies required the enquiry into the bank's static memory be made.

Assessing

Following *enquiring*, the next stage is for the archivists is *assessing* the enquiry and deciding how to interpret the request and how it need to be dealt with. Various factors are considered when the archivists assess how to respond to an enquiry, including, but not limited to: the

seniority of the person or department making the enquiry within Barclays' structure; the context of the request and whether it relates to ongoing external events; whether it is time sensitive; whether it has legal implications; how long it will take to fulfil; whether it is a known item or subject request; and whether BGA has already answered similar enquiries in the past and has the information readily available or whether it will require new research. In general, known item requests are simpler and quicker to process as they often only require the retrieval of an item and either sending a copy over to the enquirer or communicating its content to them. For most known item requests, they would avoid the *researching* stage and skip to *constructing* and *disseminating*. In these instances, this would not be the co-creation of memory, but instead this would be outsourcing memory to the archivists who act to locate and return requested information or documents. The interpretation and use of this information or these documents is then at the discretion of the enquirer as the relevant information or copies of the document are passed from the archivists to the enquirer.

In the case of the Transform Programme, the enquiry was high level, urgent, and would require new research to be conducted making it a subject request. Despite these factors, the enquiry still gave the archivists a wide scope in how they interpreted in the view of the Group Archivist as although "the people running the campaign […] had ideas about the things they were hoping to find […] the onus was on us [the archivist] to come up with those stories." In addition, the enquiry suggested that there was a lack of institutional memory outside of BGA, with the archivists stating that:

> I remember being asked specifically, whether Barclays had done anything like that before? The answer was yes. That's well documented. So, I think that was a bit of a surprise to the people who are asking, because they thought they were inventing something new.

Hence, Jenkins and the team responsible for constructing the historical narrative that the Transform Programme would use in Group Communications were relying on the skills and

tacit knowledge of the archivists to interpret their enquiry and respond produce useful information. Therefore, this is not a simple case of outsourcing the retrieval of memory in the same way that a known item request is. Instead, this enquiry is the opening phase of a process of collaboration that relies on communications between different parties with different skill set, priorities, and professional knowledge co-creating the final result.

Researching

The next stage of the process is *researching* which is primarily undertaken by the archivists themselves. For the Transform Programme, the archivists were completely responsible for undertaking the historical research in archives. It is not unusual for the archivists to be tasked with conducting the research that allows for the construction of memory. Indeed, according to the Group Archivist "most people assume that that's what we're [the archivists] are here to do [research Barclays history], they don't really have a distinction between an archivist and a historian, and they just see us as being experts in the bank's history because we've got the records." This responsibility is a key difference between corporate archivists and archivists who work in public archives. Indeed, both the archivists interviewed had previously worked in the public sector and both stated that there were differences in their roles and priorities working at a corporate archive. For example, the Group Archivist stated that:

> […] we write that [internal magazine] content quite a lot of the time, we start, we do the research, and we produce a finished article. Which is not something I would have done when I was working in local government. When you're an archivist in local government, your role is to produce the archives, and somebody else then does the research and writes the article.

Hence, for the Transform Programme – and for internal historical research at Barclays generally – it was only the archivists that entered into the archives to conduct research and then passed the findings back to executives. Indeed, as the Group Archivist stated:

> [T]here was quite a lot of onus on us to do some original research and try and find new stories, which was hugely challenging, because without a sort of a lead into the archives, […] it felt a bit like the campaign was very dependent on us coming up with interesting stories.

Not only were the archivists tasked with conducting research that would allow Barclays to construct that historical narrative it needed for its strategy, but it was also important that they could provide evidence that would support it. Due to the recent scandals that led to Barclays initiating the Transform Programme, the bank needed to be able to evidence that the historical narrative that would underpin its new corporate culture was factually accurate and based on historical sources. Providing this evidence was a task that fell on the archivists, with the Group Archivist stating:

> And Barclays were very keen that the stories be 100%, reliable and authentic. And we were challenged on a legal basis as to what is your evidence for this? So, if it was a second-hand story in a book, that wasn't really good enough, we needed some original archival evidence to show that yes, this is what happened.

The research stage is where the conversion from static to dynamic memory begins as the information preserved in the records is interrogated and reevaluated against the enquiry, strategic needs of the bank, and the tacit knowledge of the archivists about what else is held in the archives. Ideally, this process would also lead to the creation of new static memory documents that record research process and its results, enabling the archivists to avoid repeating the same research in the future.

Constructing

The next stage of the process is *constructing* where the archivists feed the results of the research back to the enquirer. For known item request, this can be a short sage where the documents or information are transmitted to the enquirer and the archivists answer and queries the enquirer may have about it. While other parts of the process are either one party acting under its own impetus, such as during capturing or researching, or can be seen as a one party acting to begin

the collaboration by shaping its term, such as during *enquiring*; *constructing* is the phase where much of the co-creation takes place and where the impetus to drive it forward becomes more flexible. Here, the archivists passed the findings back to those responsible for constructing the narrative but, according to the Group Archivist, remained as "fact checkers" as "if something had gone slightly astray, the onus was on [the archivists] to correct that."

Indeed, documents preserved at BGA show this process in action. One of the most visible products of the Transform Programme was a video called *Made by Barclays* (see below). An early script for this video (Barclays, 2012) shows the work of two of the archivists who act to correct factual mistakes, such as who was on the throne of England when Barclays was formed; clarifying issues of historical interpretation, such as whether Barclays should be stated to have funded the Stockton-Darlington railway when in reality it was the Backhouse & Co. bank, a bank that amalgamated with Barclays in 1896; and queries over corporate terminology, such as whether the bank "appointed" or "employed" Hilda Harding as Britain's first ever female branch manager. Indeed, one of the archivists attended a day of filming in London at Barclays historical head office on Lombard Street where she oversaw the use of some of BGA's artifacts. It should be noted that there is no evidence suggesting these were points of conflict between the archivists and the *Made by Barclays* script writers but instead signs of a process of co-creation where both groups – archivists and non-archivists – put forward their understanding of the bank's history. Indeed, the majority of the points raised by the archivists were incorporated into the resulting narrative and the one that was not, Backhouse & Co. and the Stockton-Darlington railway, can be argued to have been a necessary simplification for a short, 4-minute film that documents over 300 years of the bank's past targeted at a non-specialist audience.

For the Managing director of Corporate Communication who was part of the team tasked with constructing the narrative "the ability to call upon the heritage was incredibly valuable" and

"the archive team were incredibly effective at understanding what that objective [of the Transform Programme] was and helping find the evidence." Therefore, the original enquiry and the strategic objectives of the Transform Programme were instrumental shaping what the resulting narrative would be, the project relied on the research conducted by the archivists and the collaboration between both groups – archivist and non-archivist – to construct the final narrative that was used.

It is during the *constructing* stage when static memory is converted to dynamic memory as the results from the *researching* phase are communicated to the enquirers. Through this communication between archivists and non-archivists, the information that was preserved in the archives is converted to dynamic memory in the form of narratives that convey that information. This dynamic memory is then compared with the dynamic memory held by the enquirers, with both sets of actors working together to construct a single narrative that can then be disseminated throughout the organisation.

Disseminating

The final stage in constructing memory at Barclays was the dissemination of the narrative that had be co-constructed during the Transform Programme. As mentioned above, the most visible form this took was in the *Made by Barclays* (Huntley, 2012) video that was shown at the launch event in December 2012 and was part of a mandatory training session for all 140,000 Barclays employees (Hill, 2013). Indeed, the video was part of induction training for new employees post-2012, with one employee, the Head of Content and Marketing, mentioning "they were still using that film with the Morris minor when I started [in 2014] and they showed that to all the starters." Indeed, the dissemination of the narrative also appears to have inspired some managers to take a greater interest in Barclays' history, with another manager, a Managing Director for Corporate Banking in the Midlands, stating that they "did a lot of the values training that we did under Antony Jenkins so that made me look into the history as well." The

same employee also suggested that this memory affected how he, and other employees, acted in the future, stating "I think having a history, or being able to point to a history, and having some core values helps you in the future to understand why you need to get back to where you were so they [employees] can identify with something."

As well as the training scheme and the *Made by Barclays* video, the bank also decorated its head office with historical images that had been used in the video, even displaying the Morris Minor used in the video (see Figure 2 and 3). These took the form of posters inside the lifts as well as on the doors of the lifts, and seven foot tall plaques that reminded staff of the five historical Barclays values: respect, integrity, service, excellence, and stewardship; these plaques were removed in 2015 after the dismissal of Jenkins (P. Jenkins & Arnold, 2015). Many, although by no means all, of these artifacts, documents, video and other records have been captured by BGA so that they can be used as again in future memory construction efforts.

Discussion

This study has demonstrated the processes through which organisational memory can be crafted and articulated through the production of historical narratives. The construction of organisational memory at Barclays was the result of intra-firm cooperation between at least two different mnemonic communities within the bank, namely the Barclays Group Archive and the Barclays SMT (Coraiola et al., 2023). Our data suggests that this pattern would be found in other large companies that create and share historical narratives about their pasts. Indeed, we know from publications by corporate archivists at other firms that the co-production of historical narratives by teams is standard operating procedure for corporate archivists (Bieri, 2012; Mitchell, 1989; Strickland, 2017b) but how this collaboration plays out and why managers engage in it has been overlooked.

Our findings evidence how the construction of memory by large organisations through the production of strategic historical narratives is a co-operative, team-based process that involves numerous stakeholders. We have developed a process model detailing how and when different stakeholders collaborate over memory construction. We believe the mapping of this process provides a framework that can be utilised by OMS scholars who are examining the collective, relational nature of the processes involved in memory work. In developing this model, we challenge the notion that only SMT control the production of historical narratives on behalf of their organisation. This study has proven how the construction of organisational memory is an endeavour in which leaders share, and in some instances cede, control over the production of historical narratives with other professionals such as archivists and that the power of the various actors to shape the narrative shifts throughout the process. This means consideration must be given to the complex hierarchical power relations within large organisations and how this influences the process of producing such historical narratives at all stages. Our case study shows that despite differences in organisational power between the two mnemonic communities, they were cooperative rather than one trying to dominate the other. Future research could look at how these the unequal relationships are negotiated to avoid abuses of power by the more powerful group or what circumstances encourage restraint by the more powerful group. Such an approach would also allow us to better understand the polyphonic nature of memory construction and connect it to discussions of power.

Our study also highlights the necessity to use both the functionalist and interpretivist models to understand the processes that construct organisational memory and disseminate it through the organisations. While organisational memory studies has moved away from the retention bins (Fiedler & Welpe, 2010; Walsh & Ungson, 1991) to focus more on how people within organisations construct memory (Rowlinson et al., 2010), individuals who are the link between the information held in these retention bins and the employee who want to use it to

construct memory has been overlooked. While we agree that it is individuals who remember, not organisations, it is important to recognise the sources that individuals draw on to construct their memories and the processes that enable them to be preserved and accessed. Our study shows how the static memory preserved in the archives is converted into dynamic memory that can then be used to construct historical narratives that are disseminated throughout the bank in an attempt to create an organisational memory that is shared by its employees. Without the archivists and BGA, the process to preserve static memory and convert it into dynamic memory would have had to take place in another way if at all. Future research could help to identify similar processes at organisations without professional archivists or records managers.

Our study also shows that there are different ways that the archivists at Barclays facilitate memory work for the bank's employees. Our process model shows how the archivists' work in both memory work that requires co-construction and for more routine process where the memory work is outsourced to the archivists. While our case study focuses on the co-construction processes during a subject request as it is more complex brings this process to light, the routine outsourcing of memory work during known item requests should also not be ignored. Much OMS literature focuses on the more complex initiatives that construct organisational memory (Coraiola et al., 2023; Foroughi et al., 2020; Rowlinson et al., 2010), but ignoring the quotidian uses of an organisation's static memory risks ignoring the majority of the memory work that is performed. While arguably less complex, it is the majority of the archivists' work and still relies on the capturing and assessing phases performed by the archivists, with the capturing in particular enabling the swift retrieval of the requested information or documents. Although Barclays does employ an external firm to provide records management services for records that are legislated to be preserved for a set period of time before being destroyed; this company cannot conduct research into the records nor does it provide a search service, with users required to provide the exact details of what they need.

Future studies on organisational memory should look to integrate the everyday uses of static memory documents as part of the memory construction process.

At Barclays, the archivists preserve types of records that remain useful but are not required to be preserved by law, as well as being able to interpret requests so they can provide the requested document as well as anything else that may be relevant. Additionally, due to the capturing process, BGA's catalogue can be searched using multiple data points rather than just identifier numbers making it easier for employees to request documents using the terminology with which they are familiar. Hence, even in the more routine outsourcing of memory retrieval, the archivists at Barclays provide a service that cannot be replicated elsewhere in the firm. The uniqueness of the services that BGA provide within Barclays raises the question for future organisational memory scholars of whether the firms they are researching have multiple established processes and routines for constructing memory or whether they have different ones for different types of memory and how this affects memory construction processes.

In our case study there were few, if any, signs of tension between the archivists and non-archivists. This may be surprising considering the organisational power differences between the two mnemonic groups studied but suggests that collaboration between groups is important for the successful creation of wider organisational memory. In other contexts, however, the tension might be greater, particularly when the non-archivists put pressure on archivists to participate in the creation of historical narratives that are compelling to audiences, but which are factually inaccurate or untrue. There are indeed examples of companies that have created and extensively used entirely untrue historical narratives, such as the clothing retailer Hollister, which invented an entirely fictitious firm founder to use in marketing and employee induction materials (Brown et al., 2018), or at Pan American airlines where the memory of the elites within the company contradicted the documented evidence in its archives (Durepos et al., 2008). Explaining variation between companies' willingness to take liberties with the historical

record in the interests of creating a good story ought to be investigated by scholars of organisational memory, and whether the presence of professionals who specialise in preserving and interpreting the past – for example, corporate historians, archivists, and museum curators – act as a check against such tendencies. Additionally, how external context may affect the choices that firms make when constructing memory should also be considered as it is possible that it was Barclays' unique circumstances that led to the approach the SMT took.

Not all cultures regard the citation of historical documents as essential for a historical narrative to be considered to be true: many Indigenous historical cultures have rich historical narratives that are not based on documents. However, for people in Western cultural context like the UK, documentary-based historical narratives have long been seen as the sine qua non of a reliable historical narrative (Woolf, 2011). The presence of the firm's archive exists to preserve and organise collections of documents to allow the historical narratives produced by the firm's employees to have greater rhetorical force. This was also important for Barclays as they were suffering a crisis of legitimacy and needed to be able to prove its claims. It may be that firms in cultural contexts in which people do not equate the citation of historical documents with accuracy in a historical narrative, that have an oral culture rather than a written culture and therefore do not tend to preserve static memory in the same ways, or companies are who are widely trusted would not need to invest resources in an archive similar to the BGA nor rely so heavily on the skills of its archivists when creating historical narratives as they could expect to be believed without providing evidence. Cross-cultural research organisational memory practices in firms in Western and non-Western countries would allow us to determine how national historical cultures influence how historical narratives are used in firms.

Limitations

Our study does have some limitations related to the data that we have gathered. One main limitation is that we lack the data to assess the success of the collaborative process in regard to whether the resulting historical narratives was acceptable to the wider Barclays mnemonic community. While we do have interviews that suggest it was, and the fact that Barclays still use versions of this narrative to the present day further supports this assumption; Barclays it too large an organisation for us to be able to be certain that the narrative has been accepted as a genuine version of the bank's past across the entire organisation.

Another limitation is that we only have interviews with some of the people involved in the memory construction process and were not present at the time of the events under study. While we have tried to ensure as accurate a recreation as possible, we are reliant on interviews with a subset of the participants about events that were at least five years previous when the interviews took place. Additionally, we know that an external firm were used to film the *Made by Barclays* video and had some control over the narrative as we have documentation from them preserved in BGA, but we were not able to interview them. While we have made substantial use of records created at the time to compare what we were told with what has been recorded, it is possible that there may be other steps within the process we missed, or that steps we have identified could be broken down into discrete activities that were not documented. Future research could take an ethnographic approach to examine how the micro-foundations of the process we have identified.

Conclusion

This study shows how a greater appreciation of the collective nature of the process by which organisations produce historical narrative in necessary to understand organisational memory. When a firm or other organisation produces a historical narrative, it is usually the product of a team effort, each member of which contributes to outcomes that would be impossible for a

single individual to achieve. The existing literature on organisational memory ignores the collaborative nature of organisational memory and of rhetorical history and has tended to examine organisations' historical narratives as if they were produced by individuals rather than by teams. Future research on organisational memory and rhetorical history should be more polyphonic and more interested in the dynamics of interdisciplinary teams, which will capture the role of corporate archivists and the collaborative processes by which firms produce historical narratives.

Our study also shows that organisational memory often relies on static memory in the form of preserved documents and records as sources for its construction. Future research should incorporate the diverse ranges of sources that are used by individuals within organisations to construct memory, how they are used, who accesses them and how, how they are converted into dynamic memory, and whether certain types of sources are used more often to construct certain types of memory than others. These findings should also be of interest to managers as they show that investment in specialists and processes that enable an organisation to capture its static memory efficiently give it greater potential to construct narratives that are useful in pursuing its strategic goals.

Finally, our study shows the value of having professional archivists involved in the construction of rhetorical history narratives. Not only are such narratives often the result of collaborative processes, in this instance it also relied on the work of professional archivists to ensure the resulting narrative retained a degree of factual accuracy. Future research on the construction of organisational rhetorical history narratives could focus on how they are constructed rather than just why they are constructed, whether factual accuracy was an important part of its construction, and what were the methods employed by the organisation to ensure this accuracy. This research would provide scholars and managers a better understanding of the limits of rhetorical history strategies and the malleability of history.

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Table 1

Interviewee's roles, reasons for engaging in memory work, and whether they are considered part of BGA's mnemonic community, the SMT's, or other and therefore the target of the memory work rather than a participant in the co-construction of memory in this case study.

Informant's Role	Connection to the archives	Mnemonic community
Director of the bank's Corporate Communications	Part of a programme to create a new set of corporate values partly based on the history of the organisation	SMT
Head of Board Support	The archives report directly to them, and they are responsible for the creation and preservation of board minutes	SMT
Vice president Campaigns content and planning	Part of a programme to create a new set of corporate values partly based on the history of the organisation. Ad-hoc marketing pieces and the design for the 2015 AGM.	SMT
Relationship Director	Celebrating a corporate client's anniversary	Other
Head of People and Engagement for Technology	Use the archives for displays at the offices he works at which is a listed building and sometimes opened to the public, internal decoration of the business park attached to the listed building, and visits with apprentices to the archive.	Other
Relationship Support Manager	Celebrating a corporate client's anniversary	Other
Head of Corporate Relations London and Southeast	Celebrating historical branches in the Southeast and to provide material for conversations with journalists or local MPS	SMT
Managing Director - Midlands Corporate Banking	Celebrating corporate client anniversaries	Other
Managing Director at the Investment Bank	Pitching to South American (non-specific) governments	Other
Senior Media relations manager	Producing content for the bank's websites	Other

Head of Content and marketing	Producing content for the bank's websites	Other
Managing Director	Putting together a wellness initiative at the bank using its historical employee sports clubs	Other
Relationship Director, Retail and Wholesale	Celebrating a corporate client's anniversary	Other
Managing Editor at Speakmedia	Uses the archive for history-based content for the bank's websites	Other
Legal, Vice President	Ongoing legal cases	Other
Assistant Vice President – BCS	Her own work as well as answering colleagues' queries	SMT
Managing Director - Corporate Communications	Part of a programme to create new corporate values as well as researching the bank's history in politically sensitive regions such as South Africa	SMT
Director & Assistant Vice President – BCS	Her own work as well as answering colleagues' queries	SMT
Former CEO	Initiated a programme to create a new set of corporate values partly based on the history of the organisation. Also, used historical information in speeches to external stakeholders	SMT
Group archivist	Responsible for managing the department, conducting research as required, and other archival tasks such as collection and cataloguing	BGA
Archivist	Longest serving archivists and responsible for research and other archival tasks such as collection and cataloguing	BGA

Figure 1

Process model of organisational memory. Full lines are for links that must happen the process to complete, dashed lines are for links that should happen for the correct functioning and continued usefulness of the archives but do not always happen.