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ARTICLE

Unlearning in a banking organization: an analysis at the individual level

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Abstract

This study aims to understand how unlearning occurs at the individual level in a banking organization. We describe the work environment, identifying the spaces and times for creating situational awareness and the limits to temporal freedom; investigate how errors and accumulated knowledge are processed in organizational daily life; understand how constant changes affect the unlearning process; identify the existence of elements of the unlearning process in the management practices of workers in leadership positions and describe them. This research is exploratory and descriptive, with a qualitative approach, being a single case study. The data collection techniques used were semi-structured interviews, focus groups, and document analysis, enabling data triangulation, which were analyzed using content analysis. The results reveal that unlearning at the individual level occurs fortuitously due to obstacles that make the process difficult and lack the means and actions that intensify daily practices for unlearning in the organizational environment. By applying the proposed analytical conceptual scheme, it was found that the occurrence of unlearning requires intentional intervention- workers need to be able to unlearn.

Keywords: Organizational unlearning. Individual organizational unlearning. Multilevel unlearning. Bank organization.

Desaprendizagem em organização bancária: uma análise no nível individual

Resumo

O objetivo central do presente estudo foi compreender como ocorre a desaprendizagem no nível individual em uma organização bancária. Para tanto, foi necessário: descrever o ambiente de trabalho, identificando os espaços e tempos para criação de consciência situacional e os limites à liberdade temporal; investigar a forma como os erros e os conhecimentos acumulados são processados no cotidiano organizacional; auferir como as constantes mudanças interferem no processo da desaprendizagem; identificar a existência dos elementos do processo da desaprendizagem nas práticas de gestão dos trabalhadores em cargos de liderança e descrevê-los. Esta pesquisa é de natureza exploratória e descritiva, com abordagem qualitativa e caso único de estudo. As técnicas de coleta de dados utilizadas foram entrevistas semiestruturadas, grupo focal e análise documental. Elas possibilitaram a triangulação dos dados, os quais foram analisados por meio de análise de conteúdo. Os resultados encontrados revelam que a desaprendizagem no nível individual ocorre de forma fortuita, em razão de entraves que dificultam seu processo. Isso aponta a necessidade de meios e ações que intensifiquem práticas diárias para o desaprender no ambiente organizacional. Com aplicação do esquema conceitual analítico proposto, auferiu-se que a ocorrência da desaprendizagem necessita de uma intervenção intencional, ou seja, os trabalhadores precisam estar aptos ao desaprender.

Palavras-chave: Desaprendizagem organizacional. Desaprendizagem organizacional individual. Desaprendizagem multinível. Organização bancária.

Desaprendizaje en una organización bancaria: un análisis a nivel individual

Resumen

El objetivo central del presente estudio fue comprender cómo ocurre el desaprendizaje a nivel individual, en una organización bancaria. Para lograrlo, fue necesario: describir el ambiente de trabajo, identificando los espacios y tiempos para crear conciencia situacional y los límites a la libertad temporal; investigar la forma en que se procesan los errores y el conocimiento acumulado en la vida diaria organizacional; comprender cómo los cambios constantes interfieren en el proceso de desaprendizaje; identificar la existencia de elementos del proceso de desaprendizaje en las prácticas de gestión de los trabajadores en puestos de liderazgo y describirlos. Esta investigación es de carácter exploratorio y descriptivo, con enfoque cualitativo, siendo un estudio de caso único. Las técnicas de recolección de datos utilizadas fueron entrevistas semiestructuradas, grupos focales y análisis de documentos, que permitieron la triangulación de datos, los cuales fueron analizados mediante análisis de contenido. Los resultados encontrados revelan que el desaprendizaje a nivel individual ocurre de manera fortuita, debido a obstáculos que dificultan el proceso, careciendo de medios y acciones que intensifiquen las prácticas cotidianas para el desaprendizaje en el ámbito organizacional. Al aplicar el esquema conceptual analítico propuesto, se encontró que la ocurrencia de desaprendizaje requiere de una intervención intencional, es decir, los trabajadores necesitan tener la capacidad de desaprender.

Palabras clave: Desaprendizaje organizacional. Desaprendizaje organizacional individual. Desaprendizaje multinivel. Organización bancaria.

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INTRODUCTION

Unlearning is an emerging topic currently under debate in the field of Organizational Studies and is closely related to studies on people management due to its involvement with human behaviors. Essentially, it is a study of organizational routines and practices—originating in 1981 with Hedberg's research—that is based on the evolving understanding of capabilities at the individual level. Since then, relatively consistent definitions related to the topic have been utilized. Notably, these include studies focused on the intentionality of unlearning, such as those by Tsang and Zahra (2008), Cegarra-Navarro, Eldridge, and Wensley (2014), Hislop, Bosley, Coombs, and Holland (2014), and Cegarra-Navarro and Wensley (2019), as well as studies analyzing the multilevel (individual, group, and organizational) aspects of unlearning, as seen in the works of Cegarra-Navarro and Moya (2005), Zhao, Lu, and Wang (2013), and Cegarra-Navarro and Wensley (2019).

Moreover, although some research considers organizational learning and unlearning as part of a continuum, as pointed out by Casillas et al. (2010), more recent studies suggest that both constitute distinct organizational processes that can be analyzed separately. However, unlearning is also part of an intentional process, according to Tsang and Zahra (2008). As these authors indicate, organizational unlearning requires shedding old practices to truly adapt to new organizational conditions, thereby improving organizational performance in changing environments. The entire process begins with individual-level unlearning, even if it is driven by leadership. This logic guides the approach to organizational unlearning in this article, without denying the relationship between the two processes: learning and unlearning.

As the Knowledge Era is a current reality characterized by rapid changes, including within organizational contexts, innovative capability is of utmost importance, necessitating both organizational learning and unlearning, as articulated by Zhang, Lyu, and Zhu (2021) and Zhang and Zhu (2021). Obsolete organizational routines need to be discarded, hence the need for adaptation to these changes, making organizational unlearning essential. This process involves intentionally discarding outdated routines to open up to new organizational learnings (Tsang & Zahra, 2008). Despite this logic of unlearning the obsolete and learning the "new," most academic work focuses on the process of organizational learning rather than the process of unlearning.

In this article, which centers on the theme of organizational unlearning, the research by Klammer, Grisold, and Gueldenberg (2019) is used as a reference, wherein the concept of unlearning is referred to as the intentional process of shedding established knowledge structures. This concept aligns with the definition by Tsang and Zahra (2008), who state that organizational unlearning is a process through which organizations abandon existing routines, practices, or knowledge in response to changes in their internal or external environments.

It is emphasized that unlearning is imperative for leaders, as they must be capable of developing human capital as a primary asset to enhance performance across all organizational roles (both managerial and operational) (Cepeda-Carrion, Leal-Millan, Ortega-Gutierrez & Leal-Rodriguez, 2015; Müller et al., 2017; Ruiz, Gutierrez, Martínez-Caro & Cegarra-Navarro, 2017; Delshab, Pyun, Kerwin & Cegarra-Navarro, 2021). Organizations, embedded in environments of constant change, have realized that practices once considered best can suddenly become unfeasible. Unlearning becomes essential when there is a need to adapt to a new situation (Klammer et al., 2019; Grisold, Klammer & Kragulj, 2020; Lyu et al., 2022).

Specifically, in this dynamic context are banking organizations. Thus, an empirical study was conducted in an organization of this nature, as it is believed to be an empirical locus that presents important indicators for studies on organizational unlearning. The choice of the banking sector is justified by the constant internal and external changes associated with this activity, given that banking services face increasing customer demands, continuous technological advancement, and regulatory developments. This context heightens the need for improvements, as well as the commoditization of the services offered, requiring this segment to find new ways of working. Therefore, understanding how people perceive unlearning in the workplace is vital for organizational success. As Zhang and Zhu (2021) and Lyu et al. (2022) assert, organizational unlearning can promote innovation in organizations, increasing their flexibility and adaptability to a constantly changing environment.

This study's central objective is to understand how unlearning occurs at the individual level within a banking organization. To achieve this, it was necessary to: describe the work environment, identifying the spaces and times for creating situational awareness and the limits on temporal freedom; investigate how mistakes and accumulated knowledge are processed in

everyday organizational life; assess how constant changes interfere with the unlearning process; and identify and describe the existence of elements of the unlearning process in the management practices of workers in leadership positions.

This study is justified as it represents a way to theoretically expand and elucidate the topic of unlearning, particularly at the individual level. After all, it was only in the early 2000s that more in-depth discussions began to emerge, emphasizing the relevance of unlearning within the trends and research agendas in the field of Management (Easterby-Smith & Lyles, 2011; Klammer & Gueldenberg, 2019; Grisold et al., 2020; Yeniaras, Di Benedetto, Kaya & Dayan, 2020; Sgarbossa, Martins & Mozzato, 2021). Thus, in the context of unlearning, especially at the individual level, an analytical conceptual framework that interconnects still underexplored concepts is proposed and applied.

Given this, considering the need for the development of studies related to the topic of unlearning, especially at the individual level, and to keep pace with constant changes in the area, it becomes relevant to conduct empirical research to answer the following problem: how does unlearning occur at the individual level in a banking organization? To address the research question, the theoretical approach of the study presented below was constructed based on the theoretical framework recorded in the bibliometric research conducted by Sgarbossa et al. (2021), with due updates, integrating publications from 2021 and 2022.

THEORETICAL APPROACH TO UNLEARNING IN ORGANIZATIONS

To better understand unlearning, some historical aspects related to the topic will be revisited. Initially, it is worth noting that the first use of the term "unlearning" dates back to Dewey's work in 1938. However, the concept of "unlearning" became popular through Hedberg's (1981) work on how organizations learn and unlearn. In this study, the author argues that individuals generally acquire new knowledge in organizations to replace the old. Consequently, some knowledge is discarded and eliminated: this phenomenon he termed unlearning (Cegarra-Navarro & Wensley, 2019).

Although unlearning can be a form of forgetting (and vice versa), there are significant differences when considering the intentionality of knowledge loss. Various studies point to unlearning as an intentional, conscious process or as a voluntary effort to actively review and eliminate outdated knowledge, values, or routines (Tsang & Zahra, 2008; Cegarra-Navarro et al., 2014; Hislop et al., 2014; Cegarra-Navarro & Wensley, 2019). However, existing accumulated knowledge can also naturally deteriorate or disappear in other ways. According to Zhao et al. (2013), organizational forgetting implies an involuntary and accidental loss of knowledge.

In the approach to levels of unlearning, individual unlearning is crucial for the success of organizational unlearning. The individual context of unlearning is composed of three elements: autonomy, which allows individuals to develop innovative actions and generate new opportunities; mistake tolerance, when the organization adopts an experimental stance; and, finally, the pursuit of satisfaction and commitment by the organization's individuals, important factors for knowledge integration and sharing (Cegarra-Navarro & Moya, 2005; Klammer et al., 2019).

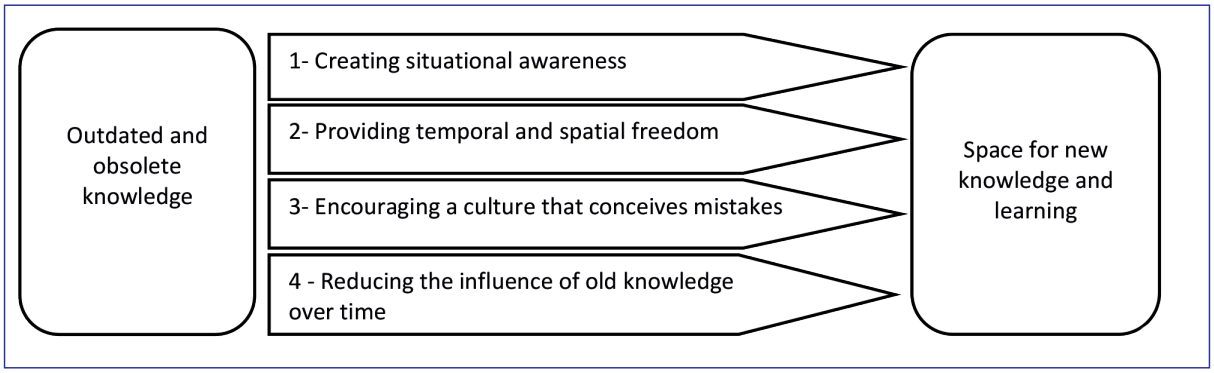
Furthermore, as well noted by Junnaid, Miralam, and Jeet (2020), in the study of the individual level of unlearning, it is necessary to recognize the particular differences of each individual. Each worker has their own way of receiving organizational change processes. Acceptance of change and the need to unlearn stems from each individual and requires close guidance, especially from leaders. Individual particularities need to be respected and understood. This empathetic stance will make the adaptation process to the new lighter and healthier, reducing potential traumas and suffering.

Thus, the unlearning process begins at the individual level, gradually permeating the group level and promoting its unlearning until it reaches the organizational level, culminating in organizational unlearning. Organizational unlearning, in turn, facilitates individual unlearning, representing a new cycle of the process (Hedberg, 1981; Cegarra-Navarro & Anddewhurst, 2006; Cegarra-Navarro & Sanchez-Polo, 2008; Zhao et al., 2013; Cegarra-Navarro & Wensley, 2019; Kmilciak, 2020).

Unlearning is directly linked to the change processes in organizations. As highlighted by Junnaid et al. (2020), change is inevitable for the survival of any organization, and it is essential to seek improvement in existing processes and systems to withstand adverse work environments. In this context, according to the authors, change usually begins with individuals and their awareness, enabling the unlearning process. When individuals encounter problems, individual cognitive patterns and routines are voluntarily altered through unlearning to find solutions.

Consequently, it is understood that unlearning is imperative for leaders, as they can influence organizational performance through their values, personalities, behaviors, and strategic choices, in addition to developing human capital as a primary asset to improve the organization's performance (Cepeda-Carrion et al., 2015; Müller et al., 2017; Ruiz et al., 2017; Delshab et al., 2021). Therefore, leaders should encourage and allow workers time and space to disengage from daily routines and stagnation. Moving freely within established boundaries, team members should be able to examine and free themselves from outdated and obsolete mental models and perceptions or routines that hinder unlearning (Klammer et al., 2019; Cegarra-Navarro & Wensley, 2019; Grisold et al., 2020; Lyu, Yang, Zhang, Teo & Guo, 2020; Lyu et al., 2022). Figure 1 highlights the four main approaches to unlearning in organizations.

Figure 1
Four main approaches to unlearning in organizations



Source: Adapted from Klammer et al. (2019, p. 455).

Unlearning creates space for new knowledge. Organizations can assist their employees in discarding old assumptions and routines by fostering situational awareness, providing temporal and spatial freedom, encouraging a culture that tolerates mistakes, and intentionally reducing the influence of outdated knowledge, as illustrated in Figure 1. By implementing the four unlearning approaches in the organizational environment, the institution facilitates the shedding of outdated and obsolete knowledge, thus creating space for new knowledge and learning (Klammer et al., 2019).

METHODOLOGICAL PROCEDURES

To achieve the objective of this study, an exploratory research was conducted in a field that is still underexplored, especially regarding this topic (Vergara, 2005). In terms of research strategy, this study is classified as a single case study (Yin, 2005). As for the approach to the problem, this is a qualitative research (Yin, 2016).

The study field is composed of three branches of a banking organization. The selection of the three branches was based on accessibility. The institution is a bank with over 200 years of existence, employing approximately 100,000 workers and serving more than 50 million customers through over 15,000 service points across the country. Internationally, the institution has been operating for more than 40 years, striving to maintain its leadership positions across all segments of the financial market. Despite the traditional nature of the organization, there is a clear emphasis on continuous change to adapt to new market realities.

Participants were selected intentionally based on their positions, which were divided into managerial and operational roles. The total number of workers was eighteen, with six from each of the three branches. The workers were identified as follows: branch "A," A1 to A6; branch "B," B1 to B6; branch "C," C1 to C6.

The research project was approved by the University Ethics Committee. Furthermore, all participants signed the Free and Informed Consent Form.

The participants are workers occupying different positions in three distinct branches of a banking organization within the same region of the state of Rio Grande do Sul. It is noted that the age range of workers in these branches varies between 30 and 60 years old; the majority are female and have less than fifteen years of experience in the bank. All participants have a minimum academic qualification of a university degree.

Semi-structured interviews, focus groups, and document research were the data collection techniques employed. Following the principles of a qualitative case study, a pilot case study was conducted in a different branch from those participating in the study but located within the same region. It is important to note that the saturation criterion was used to determine the number of research participants.

The interviews were conducted in person in March 2022, following all necessary precautions due to the COVID-19 pandemic. A semi-structured interview script was used, with each interview lasting approximately 20 minutes, conducted in a private location and recorded with the consent of all participants.

During the interviews, participants were first asked for some identification data (gender, age, position, time at the financial institution, and academic background), followed by questions related to the research topic. The questions aimed to identify how organizational unlearning occurs in the studied context by discussing aspects such as perception of: the organization creating situations that allow unlearning; awareness of daily changes and challenges at work; the search for new ways to do something that has become ineffective; the freedom to question or suggest new ideas, as well as to make mistakes in the workplace; the difficulty in changing work methods when necessary; and the acceleration of unlearning routines. There were also questions about: the existence of encouragement from colleagues in management positions to acquire new knowledge; the creation by managers of an environment conducive to unlearning due to constant changes; the perception that different people react differently to the need to unlearn something; and the use of unlearning as a way to improve work processes.

The focus group technique aimed to gather detailed information that could provide an understanding of perceptions, beliefs, and attitudes about the studied topic. A single focus group was formed via Google Meet in March 2022, lasting one hour and fifteen minutes. Initially, the goals of the "meeting" were presented, followed by the display of images related to the processes of learning and unlearning to stimulate thought and debate. Next, the investigative question was presented: "How does unlearning occur in the organization where you work?" The discussion among participants continued, and to conclude, time was allocated for questions, and thanks were given to close the session. Although all eighteen interview participants were invited, only six attended. The focus group made it possible to validate the considerations and opinions expressed by participants during the interviews, as well as issues present in the documents.

In the document research, documents available on the organization's official website and intranet were collected and analyzed. Additionally, courses offered on the organization's corporate university portal were reviewed, particularly the course "Wisdom 2020 – Reskilling: Learning to Learn." The organization's code of ethics and internal normative instructions were also analyzed. The documents were collected online and organized for later analysis together with the other data collection techniques.

Regarding the validity of the research, two strategies proposed by Creswell (2010) were used: content triangulation and participant verification. For the first, associations and comparisons of results obtained through the three data collection techniques (interviews, focus groups, and document research) were made. As Flick (2009) points out, triangulation allows for an excess of information, producing knowledge at different levels and going beyond what a single approach offers, and contributes to promoting research quality. The analysis results were reviewed and discussed with participants, allowing them to propose improvements and corrections to the findings.

The data analysis and interpretation were conducted using content analysis, as recommended by Bardin (2006), following the guidelines highlighted by Mozzato and Grzybovski (2011), given that it is a data analysis technique that is increasingly gaining legitimacy in qualitative research in the field of Administration.

Subsequently, interviews and the focus group were transcribed, and documents were organized. With the materials prepared for analysis and to make them operational, the three phases of content analysis proposed by Bardin (2006) were followed. In the first phase, the pre-analysis, a floating reading of the materials was performed. Then, in the material exploration phase, readings of the collected and organized materials were conducted, during which data were separated and selected according to predefined analytical categories, guided by the theoretical foundation of the study. However, some posteriori findings were considered for refining these categories, which are presented in Table 1. In the third phase, the content analysis technique, the treatment of results was undertaken, going beyond the manifest content, adding inferences and interpretations to the study. At this point, the researchers conducted reflective and critical analyses, using intuition to uncover what lies beneath the apparent reality.

Table 1
Analytical categories of the research

Analytical categories	Definitions	Theoretical basis
Situational awareness	Organizations should actively promote the development of situational awareness at the individual level, where workers are aware of what is happening, enabling them to identify and filter out outdated routines and knowledge.	Klammer et al. (2019)
Temporal and spatial freedom	Organizations must define degrees of freedom that allow individuals to question routines and ways of working, which allows them to unlearn experiences and procedures and, at the same time, opens space for new ideas and behaviors.	Klammer et al. (2019)
Culture that tolerates mistakes	Organizations must develop a culture that tolerates mistakes without punishment, allowing freedom to experiment with new ways of thinking and acting.	Klammer et al. (2019)
Influence of old knowledge	Organizations need to remove old models and patterns. It is necessary to create environmental conditions that encourage new patterns, such as: reorganizing desks, removing terms or phrases.	Klammer et al. (2019)
Influence of changes	Changes directly influence unlearning, in a continuous and intense way, directly affecting the individual level and interfering in the organizations' strategies.	Wang et al. (2019) Grisold et al. (2020) Lyu et al. (2020)
Influence of leadership	The leader's influence is crucial for unlearning, because when the leader encourages unlearning, it enables workers to respond appropriately to changes within and outside the organization.	Klammer et al. (2019) Grisold et al. (2020)

Source: Elaborated by the authors.

Thus, based on these categories, the interpretations and analyses of the results are presented.

PRESENTATION, INTERPRETATION, AND ANALYSIS OF RESULTS

The research results, along with their respective interpretations and analyses, are presented in this section. Initially, the context of the organizational environment of the research participants is discussed. Subsequently, the analyses and interpretations of the results are carried out. Finally, the main findings of the research related to the analytical conceptual framework that underpins it are outlined.

Context of the Organizational Environment

In the organizational environment, workers have various responsibilities and goals, making the development of multiple practices necessary, as highlighted by Grisci, Cegerza, and Hfmeister (2006). Among these practices are: relationship processes with people, operational routines, management of the client portfolio, management of assets and resources, and the management of the organization's image, which is represented by the workers themselves.

Based on the triangulation of data, during the analyses, it was possible to identify that, in the agencies studied, the daily work routines and demands are intense, resulting in little free time for the completion of courses or professional development. As evidenced by the documentary research, the organization has a corporate university where various courses are available to workers and their families. Additionally, through this corporate university, a physical library with a vast and diverse collection is made available, containing technical books, literary works, encyclopedias, dictionaries, CDs, and DVDs.

However, it is observed that workers carry out their activities under a climate of intense pressure for goals and directives, as the intense routine of striving for results was mentioned on several occasions. This was particularly evident during the focus group. A participant (C1) confirmed this perception by stating: "[...] we are measured by results. So, when the result is not good, it means something is not right. Automatically, we try to adjust something with the team." Moreover, it is evident that the organization studied is immersed in a context of bureaucratization, as expressed by A4: "[...] there are things that the bank is still quite bureaucratic about, which could be better, but I think it is very large, being such a big company, it's not possible to operate as if it were a small company." Despite this context, the partnership and connectivity among work teams are unequivocal, contributing to a pleasant and collaborative organizational climate.

Analysis of the Different Categories of Organizational Unlearning

Situational Awareness

Organizations should actively promote the development of situational awareness at both the individual and team levels, so that workers are aware of what is happening, enabling them to identify and filter out outdated routines and knowledge (Klammer et al., 2019). Through Table 2, it is possible to identify, during the respondents' statements, how situational awareness is understood and processed by them.

Table 2
Situational awareness

Participant	Evidence perceived in the statements
A1	"I am aware that it exists and is necessary. Now, if you ask me if it is easy, sometimes yes, sometimes no, because changing takes time, it takes willingness".
A5	"Yes, I am aware. Because here at the bank, something new comes up every day, but when something new comes up, it comes from the news agency, from the internal websites".
B1	"Unlearning has to do with the comfort zone that the employee establishes himself in; and, when changes come, they need to be faced with growth, with new learning".
C1	"So, even the technological issue, the replacement of systems, applications, in short, evolution as a whole requires that we forget old ways to do things in the new way".

Source: Elaborated by the authors.

It is observed that the research participants demonstrate situational awareness, as indicated in the reports presented in Table 2 and discussed during the focus group. They are able to identify obsolete processes, routines, knowledge, and behaviors and attempt to implement new ways of doing things. In the organizational environment, the importance of disseminating means that encourage unlearning is noticeable. This finding is aligned with the considerations of Klammer et al. (2019), who highlight that promoting unlearning measures increases creativity in the process of developing new products and/or services. Delshab et al. (2021) and Lyu et al. (2022) also point out that this encouragement makes workers more receptive to new ideas.

The statements of participants A1 and B1 stand out, as they report feeling or perceiving difficulty in the unlearning process. It is important to note that this difficulty is often linked to the need for people to step out of their "comfort zone," to abandon what was once considered right in order to acquire new knowledge. In this sense, the empirical evidence supports the conclusions of Tsang and Zhara (2008) and Lyu et al. (2020) that people are the recipients of change and are often forced to change their behaviors and beliefs to adapt to new environments and realities. From this perspective, even though these studies and the data from this empirical research highlight the intentionality of unlearning, which is subject to the motivation and individual effort of each worker, emotional or cognitive blocks were not considered. It is essential to do so, as such blocks not only make it difficult or impossible to abandon established knowledge but also hinder the acquisition of something new.**

Temporal and Spatial Freedom

Organizations should establish degrees of freedom that allow individuals and teams to question habits and ways of working, which facilitates the unlearning of experiences and procedures while simultaneously creating space for new ideas and behaviors (Klammer et al., 2019). In Table 3, the participants' perceptions regarding freedom in the workplace can be observed.

Table 3
Temporal and spatial freedom

Participant	Evidências percebidas nas falas
A1	"I feel like I have this freedom, I usually say. Of course we can't say everything we think, but, as far as possible, I think it's important, I try to do it and give ideas".
A5	"Yes, within the agency, yes. If it's a good idea, everyone gets involved. But if it is Brazil-level, there are things that we cannot change, because the bank is Brazil-level".
B3	"I think there is freedom, but I think there is a limit to how much you can say. I think there is freedom, but not complete freedom".
C2	"At the bank, we are constantly forced to change our way of proceeding, of applying our knowledge. There is always a demand for changes in the system and we have to carry out the tasks. We constantly have to learn and unlearn and learn again".

Source: Elaborated by the authors.

From the statements, it becomes evident that the participants perceive that they have freedom in the organizational environment; however, this freedom is limited, as reported by participants A1, A5, and B3. This limited freedom was also expressed and debated in the focus group. These empirical findings support the considerations of Klammer et al. (2019), who highlight that organizations should allow workers to use time and space to free themselves from the shackles of daily routines and stagnation. The authors emphasize the need to establish degrees of freedom that enable individuals and teams to work with greater flexibility.

The perception of participant C2 regarding the theme of organizational unlearning also stands out. In their statement, they confirm that they regularly experience the processes of learning and unlearning. This evidence refers to the concepts of Cegarra-Navarro and Moya (2005), Becker (2010), and Zhao et al. (2013), which suggest that organizations need both to learn and unlearn, as only in this way will they be able to implement knowledge management and establish a new way of working in the contemporary business environment.

Culture that Tolerates Mistakes

Making mistakes without the fear of being punished allows the worker to transform negative experiences into something positive, granting them the freedom to experiment with new ways of thinking and acting (Klammer et al., 2019). Table 4 demonstrates the participants' perceptions regarding whether the organization under study has a culture that tolerates mistakes.

Table 4
Culture that tolerates mistakes

Participant	Evidence perceived in the statements
A1	"I don't feel comfortable making mistakes, but it's something that happens, it's inevitable, we're human. So, what I have for myself is to try to improve from the mistake, not make mistakes again and try to correct it".
B6	"It's a bit ambiguous, because mistakes can happen, but the pressure we have internally, and since I'm a very old employee, we had a different attitude within the company, which I think has improved a lot today. So, I think that yes, we have this space to make mistakes".
C1	"I believe so, that we have some freedom, I don't know if it's mistakes we could say, attempts. There are some issues, also mistakes, if they end up harming customers financially, end up harming the bank financially, we have punishments. I think we have limits for these errors.".
C6	"Freedom, no. It is human to make mistakes, but always work in a way that avoids mistakes, but it can happen, there is no freedom".

Source: Elaborated by the authors.

It can be inferred that all participants, in some way, express fears, anxieties, and insecurities regarding making mistakes in the workplace, as observed in both interviews and focus groups. On one hand, there is a perception that mistakes can occur and be understood as part of the human condition, as highlighted by participants A1 and C6. On the other hand, some workers emphasize that making mistakes can lead to consequences, including punishments, as reported by B6 and C1. These findings contradict the considerations of Klammer et al. (2019), who clarify that organizations need to develop a culture that allows for mistakes, enabling employees to work without fear of punishment. This liberates them from information and knowledge that create overload and makes them more receptive to new technologies and more willing to develop new ways of performing their tasks.

Furthermore, participant C6 refers to the lack of freedom to make mistakes in the workplace. This empirical evidence reinforces the views of Klammer et al. (2019), Cegarra-Navarro and Wensley (2019), and Lyu et al. (2020), who indicate that the absence of freedom to err can be perceived as a barrier to innovative thinking and behavior, potentially resulting in rigidity and organizational stagnation.

Influence of Old Knowledge

Organizations need to eliminate old models, standards, and routines. It is necessary to create environmental conditions that foster new patterns, such as reorganizing the layout of desks, removing terms or phrases, photos, decorations, and changing corporate language (Klammer et al., 2019). In Table 5, one can identify how participants perceive the influence of old knowledge in the workplace.

Table 5
Influence of old knowledge

Participant	Evidence perceived in the statements
A3	"You're leaving the old system, you're leaving it little by little, not completely, but we're going to have to learn again and forget, or stop learning in the old system, new learning in the new system and processes".
B1	"I tend to let go of the past, I tend to let go of some things that are no longer useful, that no longer have as much effect as they did in the past. I try to adapt to this. I even like to move my personal things around".
B6	"I think it's on the right track, it still seems hazy, because unlearning seems like a bad thing, and it's not. Unlearning is happening very quickly, and it needs to be, because that's what it is, to learn, you first have to unlearn".
C1	"We always realize that something is not working, because we are measured by results. So, when the result is not good, it is when something is not good. We try to adjust something with the team so that the result happens".

Source: Elaborated by the authors.

Participants mentioned in Table 5, as well as those in the focus group, perceive an influence of old knowledge in the workplace and, in some way, attempt to promote changes, adapt, innovate, and relearn. This evidence aligns with the considerations of Sgarbossa et al. (2021), who emphasize that for organizational unlearning to occur, it is necessary to discard obsolete knowledge and accept changes to make way for new routines, which are needed. This also reaffirms the studies by Easterby-Smith and Lyles (2011), which clarify that in competitive business environments, organizations must create an environment and culture where obsolete knowledge is regularly questioned and discarded from organizational memory.

It is important to highlight the individual level of organizational unlearning when evaluating the influence of old knowledge in the workplace. At this point, it is observed that participants A3, B1, B6, and C1 perceive the need to abandon old systems, routines, behaviors, and knowledge. Such empirical evidence supports Wang, Qi, and Zhao (2019), who mention that individual routines can restrict workers' behavior in the face of changes in the environment; outdated routines inhibit individuals from researching, evaluating, and acquiring external resources, as well as reduce their perceptions of the value of these resources. Furthermore, the mentioned evidence supports the findings of Cegarra-Navarro and Wensley (2019) and Kmilciak (2020), who argue that individual unlearning is a deliberate behavior of changing inadequate routines. Through individual unlearning, organizations can obtain more external resources, providing the elements needed to cope with a changing environment.

Influence of Changes

Changes continuously and constantly permeate all processes of organizational learning, unlearning, and relearning, impacting individual, group, and organizational levels and directly influencing organizational strategies (Zhao et al., 2013; Becker, 2019; Wang et al., 2019). Table 6 illustrates the influence of changes in the workplace, according to participants' reports.

Table 6
Influence of changes

Participant	Evidence perceived in the statements
A1	"Yes, we have to unlearn in the sense of having to learn new things all the time, whether it's different lines of credit, different ways of doing them, encouraging other people to use digital channels, for example, encouraging them to change the way they access them".
B1	"Changes apply to everyone. Those who have this perception of abandoning what is in the past and participating in the deconstruction process tend to have an easy time making things flow. Those who cling more to things from the past have a lot of difficulty".
B3	"I think that changes make you learn new things and, sometimes, they show that the things you had learned are no longer necessary. It was that resistance to keep that thing there, everything was wrong. It's not wrong, but, like, this new learning is much better than that thing you were holding on to. It would be good to unlearn that, you know?".
C1	"Some have more difficulty, some take more time to accept this, to absorb it, but the constant need for changes in the environment interferes with us and accelerates us as individuals, for sure".

Source: Elaborated by the authors.

Participants A1, B1, and B3 perceive change as an influential factor in organizational unlearning. This issue was also prominently discussed in the focus group. These findings corroborate Argote and Ingram (2000), Wang et al. (2019), Lyu et al. (2020), and Lyu et al. (2022), who demonstrate that, in a changing environment, routines can become obsolete and lead to rigidity, viscosity, or inflexibility. Thus, unlearning can enhance strategic flexibility because it helps organizations fundamentally change outdated routines.

Another point to highlight concerns how change is experienced by workers. While some individuals find it more difficult to cope with this process, others approach it with greater ease. This can be confirmed by the statements of participants B1, B3, and C1. Such evidence validates Zhao et al. (2013) findings, which emphasize the necessity for workers to reflect on their performance to identify and promote actions that contribute to achieving better results.

Influence of Leadership

During periods of change, leaders must create an environment conducive to unlearning, using means that stimulate and facilitate the process according to the perspective and opinions of the workers. Leadership that promotes unlearning can introduce organizational practices that not only enhance the organization's ability to deal with the uncertainties of difficult times but also help it emerge stronger in the future (Müller et al., 2017; Cegarra-Navarro & Wensley, 2019). The accounts presented in Table 7 highlight the participants' perceptions regarding the influence of leadership on unlearning.

Table 7
Influence of leadership

Participant	Evidence perceived in the statements
A2	"Usually, even the senior colleagues [leaders], they are in the same game, they need to unlearn too, the process is the same for practically everyone".
B1	"Yes, the leader transfers the institution's discourse. In this process of deconstruction, he is required to make the discourse that the process of deconstruction is necessary, and requires adaptations, and requires constructions, of new things".
B4	"I believe so. I don't think it's specific to the leaders, but what they pass on from the organization. I believe so, with the intention of the employee finding a new way of working".
C1	"I believe so, perhaps there is no specific tool for unlearning, but I think that, in daily conversations with leaders, in the moments we have contact, we perceive this direction for change".

Source: Elaborated by the authors.

Considering what is presented in Table 7 and what was discussed in the focus group, it is evident that participants believe their leaders influence the process of unlearning in the work environment. Participant B1's statement highlights that the leader should promote deconstruction to build new things. This evidence aligns with the considerations of Cepeda-Carrion et al. (2015), Ruiz et al. (2017), and Delshab et al. (2021), who infer that unlearning is imperative for leaders, as they can influence organizational performance through their values, personalities, behaviors, and strategic choices, in addition to aiding in the development of people to improve organizational performance. Moreover, this evidence validates the findings of Müller et al. (2017), who emphasize that leaders should foster a conducive context for unlearning, using means that stimulate and facilitate changes in their members' perspectives and opinions.

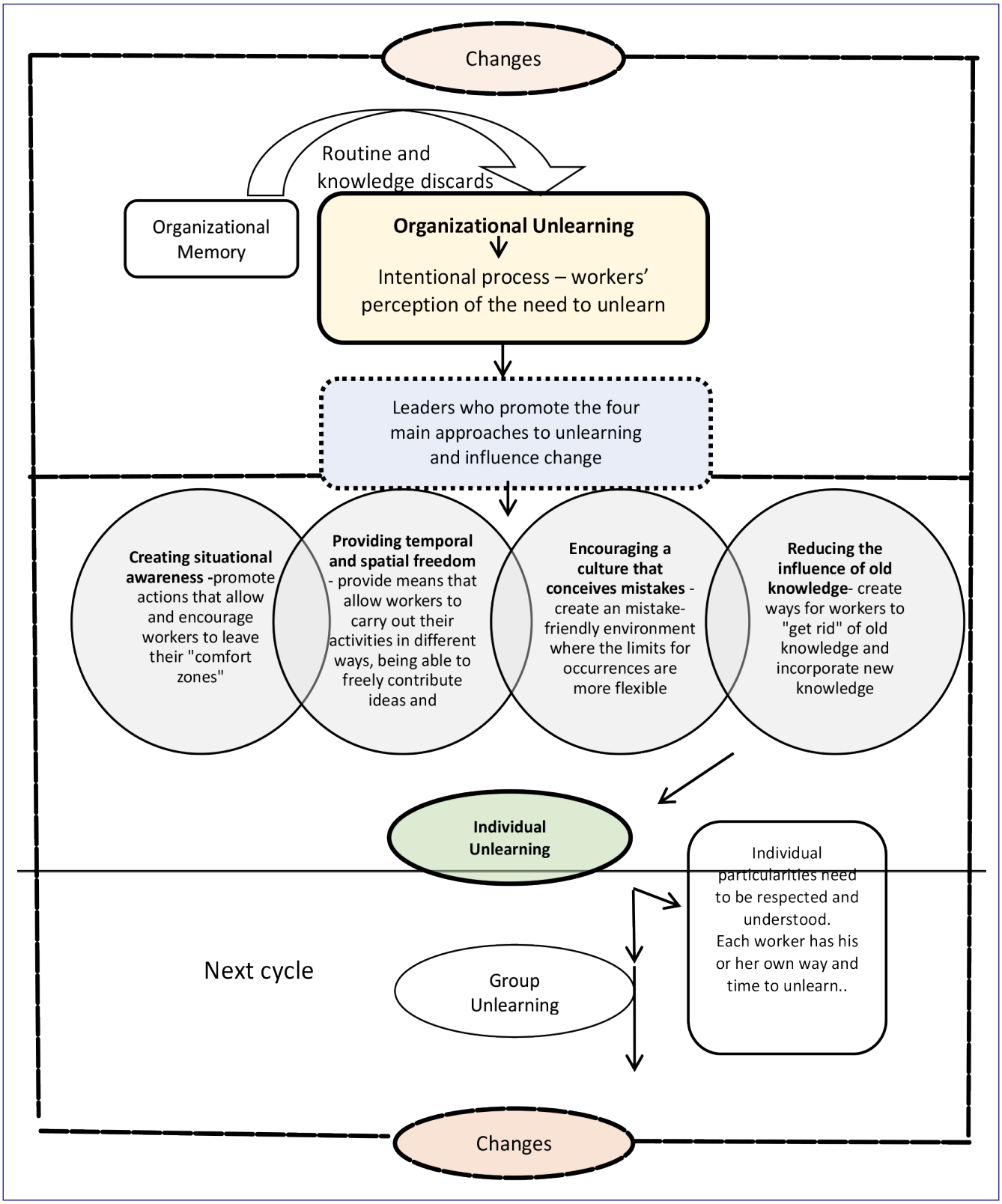
However, it is observed that some participants, such as A2, B1, and B4, perceive leadership encouragement as a driver for the organization, comparable to a "cascade effect." In this case, it is implied that the influence does not stem from the specific actions of the leaders but rather from the fact that they convey the actions they need to perform due to their positions. Empirical evidence supports the findings of Junnaid et al. (2020), who highlight that leadership influence is highly significant in the successful implementation of change, especially when grounded in corporate values and communication channels.

Analytical Conceptual Framework of the Study

Through the analyses conducted based on the analytical categories of this research, it was possible to gain a deeper understanding of how unlearning occurs in a banking organization. The four main approaches to organizational unlearning, as outlined by Klammer et al. (2019), were interconnected with the influence of changes and the actions of leaders in creating situations that encourage unlearning. It was also possible to define unlearning as an intentional process, dependent on workers' perceptions of the need to unlearn, which starts at the individual level and gradually influences the group, and eventually, the organization as a whole.

To meet the proposed objective of understanding how unlearning occurs at the individual level in a banking organization, Figure 2 presents the analytical conceptual framework constructed for this purpose, with the presentation of the empirical research results.

Figure 2
Analytical conceptual scheme presenting the results of the empirical research



Source: Elaborated by the authors.

The results of the empirical research are illustrated through the analytical conceptual framework proposed in this study. As presented in Figure 2, the occurrence of unlearning requires intentional intervention; that is, workers need to be equipped to unlearn, identifying routines, knowledge, and processes that are obsolete and outdated (Akgün et al., 2007; Hislop et al., 2014). Furthermore, they must adopt individual attitudes to deal with the difficulties during the unlearning process, remaining optimistic and confident to recognize the necessity of this process and effectively carry it out (Hedberg, 1981; Cegarra-Navarro & Anddewhurst, 2006; Zhao et al., 2013; Kmilciak, 2020).

The direct influence of leaders is essential (Müller et al., 2017; Ruiz et al., 2017; Delshab et al., 2021), as they are the promoters of the four approaches to unlearning (Klammer et al., 2019). To this end, several strategies by the organization, especially by leaders, in this process are fundamental.

To stimulate the creation of situational awareness, it is recommended to promote actions that allow workers to step out of their "comfort zone" and also encourage them to do so. Such action, although causing discomfort to workers, fosters a sense of progression, opening doors for the entry of new ideas and enabling the abandonment of old and unnecessary concepts.

It is suggested that resources be made available to provide temporal and spatial freedom, allowing workers to perform their tasks in different ways, facilitating their free contribution of ideas and suggestions. The perception of freedom in the organizational environment instills a sense of confidence in workers regarding their work. When their ideas and suggestions are accepted, workers understand that there is the possibility of performing their daily routines in a more varied manner. This leads them to unlearn outdated routines and processes.

In seeking to encourage a culture that tolerates mistakes, it is recommended to create an environment receptive to mistake, where the limits for occurrences are more flexible. Mistakes should move through the organizational environment in a way that does not generate fear, apprehension, and insecurity among workers. For this, flexible and well-known limits are necessary. When mistakes occur, workers perceive new possibilities and ways of working, consequently abandoning what they consider outdated and unnecessary.

Furthermore, in the pursuit of reducing the influence of old knowledge, it is advised to create means for workers to "dispose of" old knowledge and incorporate new ones. For example, appropriate times and places could be encouraged and established for conducting courses and skill development, stimulating the acquisition of new knowledge. By acquiring new concepts and knowledge, workers can perform their routines in a new way. In addition to altering task execution processes, the environment in which they are situated can also be changed, such as by rearranging desks and chairs. Such actions reinforce the need to abandon the old and unnecessary to make way for the new.

The four approaches to unlearning, present in the work environment and experienced individually by employees, facilitate the occurrence of this process, which gradually permeates the group level. At this stage, several individuals engage in unlearning, which can then influence the organizational level. Once the organizational level is reached, a new cycle begins at the individual level (Cegarra-Navarro & Sanchez-Polo, 2008; Zhao et al., 2013; Cegarra-Navarro & Wensley, 2019; Kmilciak, 2020).

The conceptual analytical framework based on the research also indicates that, in approaching the individual level of unlearning, it is necessary to recognize the particular differences of each person. Each worker has a unique way of receiving organizational change processes. The acceptance of change and the need to unlearn comes from each individual and requires close guidance, especially from leaders. Individual particularities need to be respected and understood. This empathetic stance will make the adaptation process to the new more manageable and healthy, reducing trauma and suffering (Junnaid et al., 2020).

Additionally, there is a direct influence of changes on the occurrence of unlearning. Through changes, workers are guided toward acquiring new ways of doing things, which are essential for the unlearning process to occur in the work environment (Wang et al., 2019; Argote & Ingram, 2000; Lyu et al., 2020; Lyu et al., 2022). Unlearning, therefore, allows workers to respond more adequately, flexibly, and rapidly to internal and external changes to the organization (Klammer et al., 2019). Finally, it is evident that leaders must create a favorable context for unlearning, using means that encourage and facilitate changes in the perspectives and opinions of their members and, consequently, within the organization (Müller et al., 2017; Cegarra-Navarro & Wensley, 2019; Delshab et al., 2021).

CONCLUSION

Empirical results indicate that changes enable individuals to step out of their comfort zones and seek new ways of doing things. Although changes are often imposed, they are essential for the process of unlearning to occur in the workplace, especially at the individual level.

In the studied banking organization, it was found that unlearning does occur, but in a fortuitous manner, without an initial and "organized" intention from the institution. There are obstacles that hinder this process, as well as a lack of means and actions to intensify daily practices for unlearning in the organizational environment. Therefore, it is evident that there is still a long way to go in understanding this topic within the researched banking organization.

In this case study, it was found that the work environment is pleasant, and people are supportive of each other. However, routines are intense and surrounded by rules and norms, which, especially for workers in more operational roles, makes it difficult to seek professional development. It is noteworthy that some workers express difficulties in changing and adopting new ways of performing work processes, even though they are aware of the need for change. They often cling to old methods and require an adaptation period. It is clear that workers are the recipients of change, as they are frequently encouraged to alter their behavior and beliefs to adapt to new environments and realities.

It was also identified that workers in leadership positions exert considerable influence on the unlearning process through their management practices. Unlearning is encouraged through communications via emails, meetings, and conversations, where new ways of working are addressed and the importance of adapting to the new is emphasized. It is worth highlighting some suggestions related to the specific reality experienced in this particular organization, given the different particularities between public and private banking institutions, as well as other sectors. It is crucial for the organization to be attentive to the needs of its workers and to develop and implement actions aimed at greater organizational flexibility, i.e., the ability and skill to respond quickly in changing circumstances. Mechanisms need to be created that allow workers to contribute ideas and suggestions, which should be forwarded to the relevant departments, analyzed, and utilized. Such actions foster greater employee commitment, including to the organization.

It is necessary to create an environment where there is freedom to make mistakes, even within established limits, as it is essential that workers feel supported when they make mistakes. This perception of support promotes greater trust and security among leaders and subordinates, and consequently, within the organization. Moreover, it is through mistakes that new ways of doing things emerge, contributing to the unlearning process. It is fundamental to create a physical space and appropriate timing that allow workers to engage in professional development without discomfort, as acquiring new knowledge enables the identification of obsolete routines, knowledge, and processes and allows workers to implement new ways and methods of work.

It is important to note that the suggestions outlined, although proposed based on the banking sector, can and should be implemented in other organizational activities. This highlights that this study does not merely fill a research gap in the banking sector but provides an understanding of individual unlearning that can be applied to any organizational sector. Therefore, while this case study does not aim for generalization, which is not a requirement in qualitative research, and recognizing the limitations of a single case study, it is understood that both the proposed analytical conceptual framework and the empirical results of this research offer valuable contributions to the analysis of individual unlearning in various banking organizations and other organizational sectors.

Thus, in concluding this study, its **practical contributions** are emphasized, highlighting the importance of the organization being attentive to the needs of its workers and seeking to develop and implement actions that promote greater organizational flexibility, i.e., that enhance the capacity and ability to respond quickly in changing circumstances. It is necessary to create an environment that allows freedom for mistakes and to provide physical space and appropriate timing for workers to participate in development courses without discomfort.

The **theoretical contributions** also deserve emphasis, as they show progress in the literature on an emerging topic. Furthermore, the study presents an analytical conceptual framework that interlinks previously unexplored concepts, especially regarding the individual level of unlearning.

As an additional contribution, the research presents suggestions for **future studies**: (i) reinforce studies on the influence of leaders on unlearning, especially at the individual level; (ii) investigate unlearning at the individual level, focusing on the peculiarities of different working generations, also considering intergenerational aspects in the process; (iii) use the presented analytical conceptual framework to conduct other empirical research covering different organizations and organizational sectors; (iv) develop research from the theoretical lens of the social perspective, considering people's perceptions of the occurrence of unlearning; (v) conduct empirical research that provides more evidence on the intentionality of unlearning, whether it arises from the individual or is prompted by leadership due to organizational needs; (vi) expand the presented analytical conceptual framework by analyzing all levels of unlearning; (vii) conduct empirical research that addresses organizational unlearning in conjunction with organizational learning from a multilevel perspective.

In conclusion, understanding that unlearning is essential for organizations to keep up with and manage change processes in the workplace, it is emphasized that there is still much to be studied, especially regarding people's perceptions. In this sense, this research encourages and hopes that further theoretical and, particularly, empirical studies related to the topic of unlearning will be developed in the country.

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Anelise Rebelato Mozzato: Project administration (Support); Supervision (Lead); Validation (Equal); Visualization (Equal); Writing – original draft (Support); Writing – revision and editing (Lead).

DATA AVAILABILITY

The entire dataset supporting the results of this study is not publicly available.

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