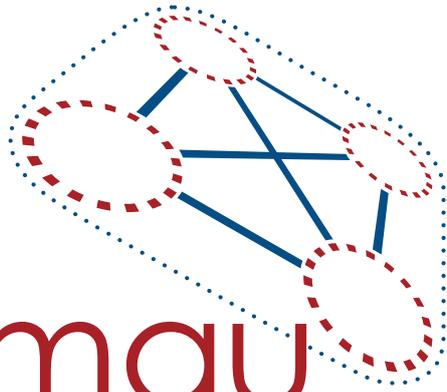


## History trip: a process guide

---



**Dalmau**  
CONSULTING

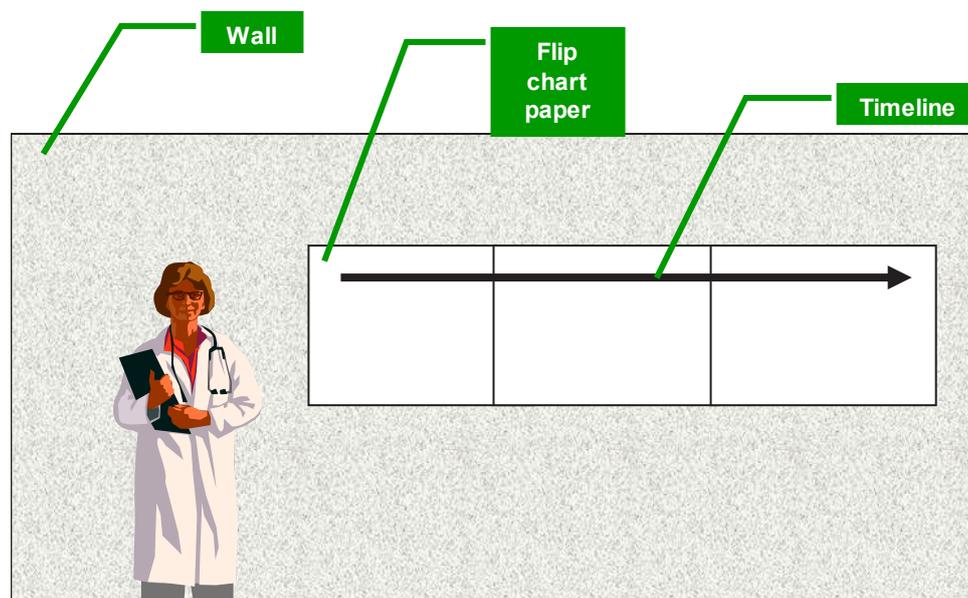
Dalmau Consulting  
April 1, 2000

## Introduction and context

Below is a simple and straight-forward description of how to conduct a history trip process. It was first described to me by John Sherwood in the mid 1980s and is documented more completely in Dick and Dalmau: *To tame a unicorn*, Interchange Publications, Brisbane, 1989. (<http://www.aral.com.au/publ/books.html>). The history trip process is rarely used by itself, more often as the front end to some more complex process. This resource document does not account for the wider context in which it might be used, it simply describes the process.

## Prior to the process

Prior to the start of the session, the facilitator and or assistants set up the wall for the history trip. They place 2 or 3 sheets of flip chart paper horizontally on the wall at head height as per diagram



- On the flip chart draw a horizontal line with an arrow at the right hand end.

## Context setting

---

Facilitator introduces this session by stating the fact that if we share more information with one another, we can build stronger relationships and this in turn aids in forming a stronger identity. S/he can use the six circles model as the basis of this context setting. All the processes, structures and patterns in the world will not survive unless the relationships, information and identity is strong below them

## History Trip

---

Ask the participants to think back over all their time with the business, and as they do identify one event in their memory that symbolizes for them (more than any other event) the essence of "who we are as a business/organization/group", i.e. that symbolizes our identity.

If it would help you can suggest to them that they list on a piece of paper the historical events which had significance for them, and which continue to have present significance.

Encourage them to try for as many events as they can, and to include early events (including second-hand events when someone else told them about an earlier event).

At this stage they are not concerned about identifying the significance, or about distinguishing the relative importance of the events they list.

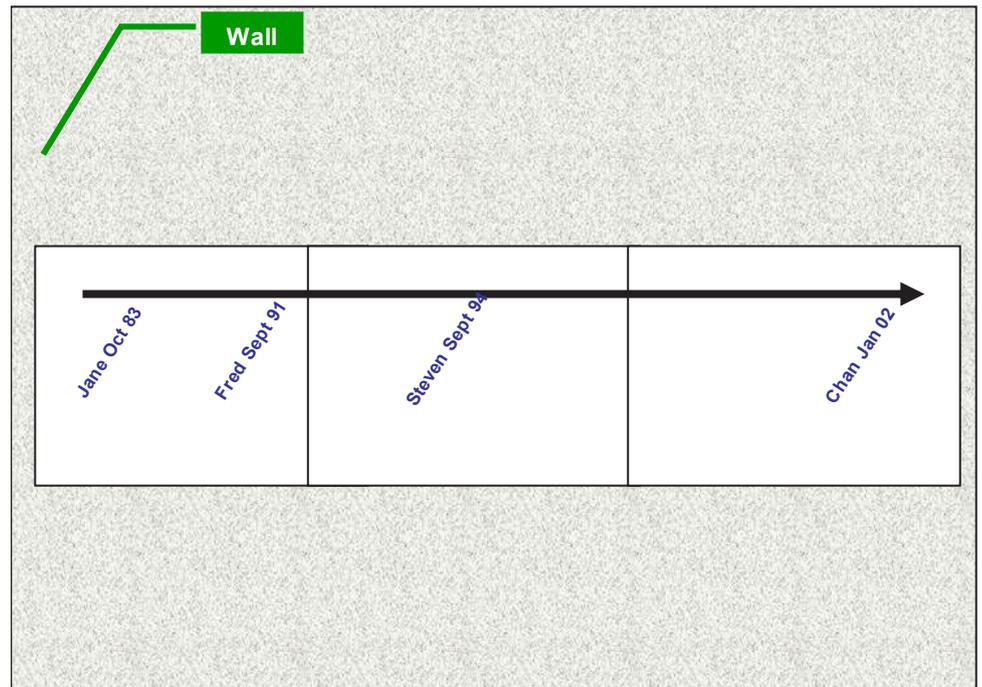
Then suggest people rank their events in order of significance. And as they do, they begin to get a clear sense of which one is the most important in symbolizing the essence of who we are as a business and why

Now the Facilitator asks who has an early event, and what the date of it is. Then ask if anyone has an earlier event. In this way, decide the date of the earliest event.

Label the arrowed end with the present date (month and year, or year), and the other end with the date of the earliest event anyone has on her list.

Ask each person to tell you when their event occurred and then list each person's event on the flip chart paper according

to when it occurred in chronological order. (see diagram below)



Please note: The participants do not tell their story just yet. All the facilitator is doing is placing the names and dates roughly in chronological order on the time line. Their story telling will come soon. Please keep these two tasks separate.

## The story telling

Now ask each person in turn to describe his or her event starting with the earliest event.

Suggest to the person that they share with the group **what** the event was in some detail, ie tell the story of the event. Then ask them to share with the group **why** they chose that event

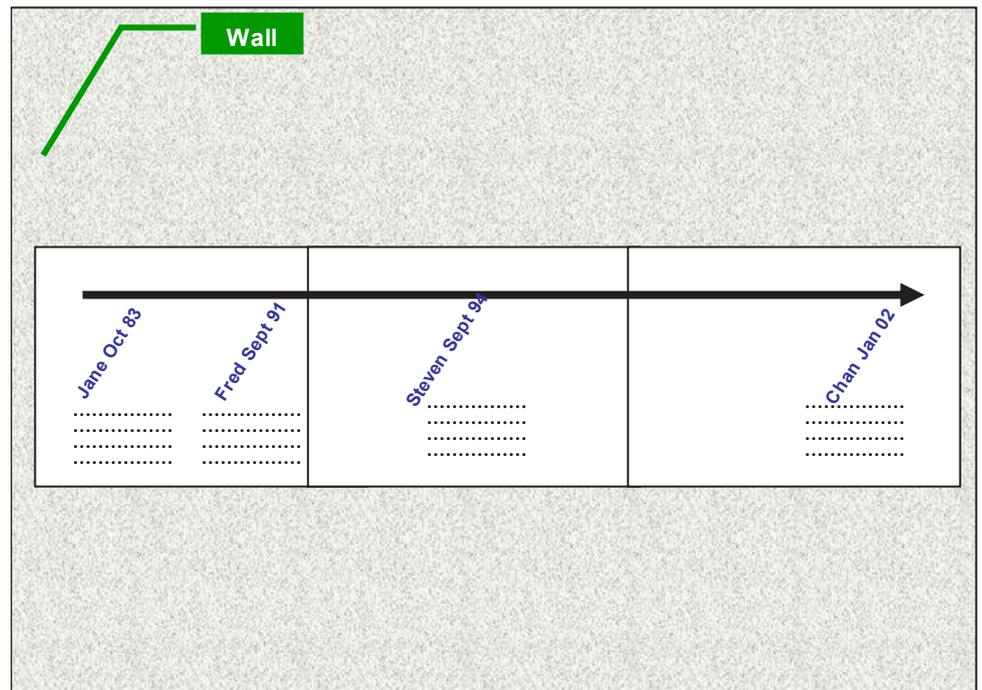
Encourage people to speak in their own words.

Encourage each speaker to tell the story to the group, not to you as facilitator or assistant. If they persist in speaking to you, look away.

Whilst each person is telling their story the facilitator or assistant listens for individual words of meaning and import, what Marshall McLuhan would have called the "hot words". Examples might be words such as hurt, realized, struggle, overcame, doubted, came together, stronger, new vision, etc

These words will be embedded in the story tellers description of why

s/he chose the particular event. These are written on the time line below the person's name.



When each person has finished telling the what and the why of their event, ask them the following question ... "What does it say about the business as a company and as a group of people [or whatever]?" or "What does the business, as it is now, owe to that event?"

As the person answers this question the assistant also writes the words on the piece of flip chart paper roughly in the space below that speaker's event

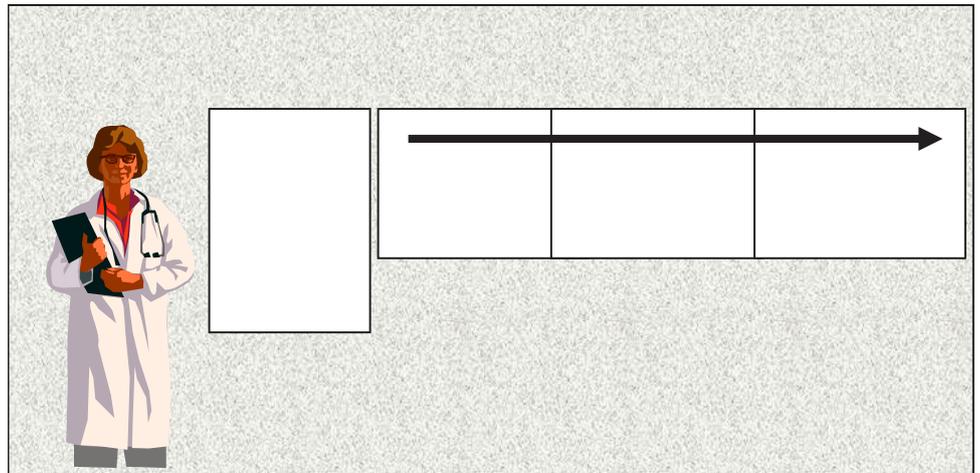
## Reflecting

Ask the people, working individually and without discussion, to examine the list and identify common trends in the stories and the meanings given to them by their colleagues.

- Ask them to exchange this individual information in pairs. They identify the items which go together, giving most attention to those groupings which are mentioned by more than one of them. This is an important step; you may have to allot it more time than you imagine.

The point here is that much of the life of an organization or system operates out of awareness. With a little encouragement (so that nobody feels foolish about it) people can sometimes group items without finding it easy to describe precisely what the items have in

common. The labels may describe the trend; but it is enough if they label it without description.



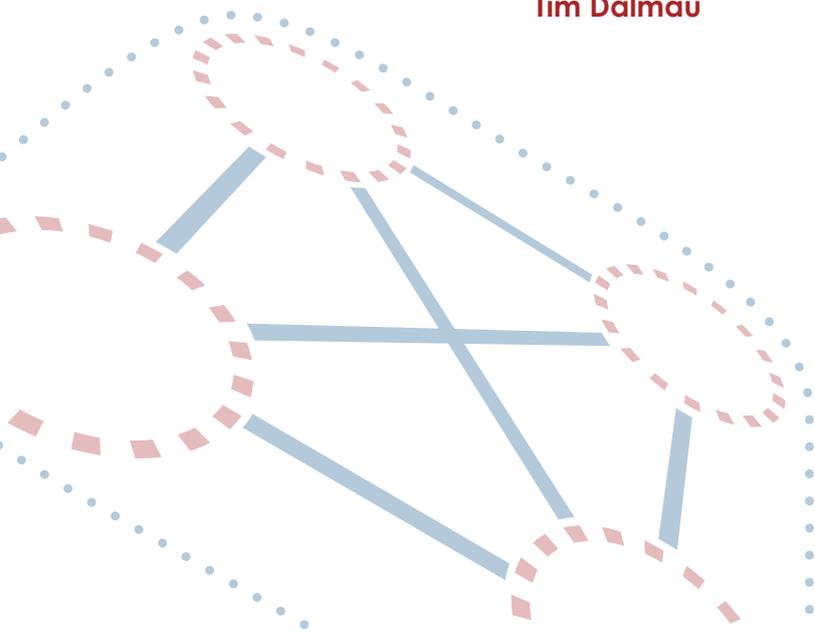
Create a separate flip chart paper on the wall just to the side of the others. Ask each pair in turn for the most important trend not already recorded. Ask them to describe the trend, and continue until all pairs have exhausted their lists.

The assistant writes down on the new flip chart paper their responses and puts on the top of the paper a heading: "WHO WE ARE"

Now the Facilitator asks the group to talk about and discuss (1) What the whole exercise has meant to them (2) What it is telling them about the company/business/group? (3) How they feel about what they have heard. This is a large group discussion

This brings to a close the actual history process and at this point the Facilitator will make the appropriate close out or segue to the next piece of work.

**Tim Dalmau**



Dalmau Consulting

Box 283 Samford Village  
Queensland 4520  
Australia

Tel: +61 7 3289 2133  
Email: [info@dalmau.com](mailto:info@dalmau.com)

[www.dalmau.com](http://www.dalmau.com)

