

## **A Roadmap for Reliable Integration**

### **Implications of High Reliability Organizing for Integrated Marketing Communications**

Daniel A. Gruber, Ph.D.

#### **Abstract**

IMC practitioners need to learn how to manage a new form of unexpected events in order to be successful in navigating the types of issues which arise in today's integrated marketing communications environment. This article explains a set of principles articulated in organizational theory to characterize organizations which face unexpected events on a regular basis, and are able to reliably and resiliently respond to them. It discusses examples of these principles in the context of integrated marketing communications and their implications for IMC practitioners. Finally, unintended benefits discovered in teaching these principles to students in the Integrated Marketing Communications program at Northwestern are conveyed.

When it comes to customer safety, United Airlines is a high reliability organization (HRO). HROs are able to anticipate unexpected events before they happen and respond to them swiftly to contain them when they do occur (Weick and Sutcliffe, 2007). However, is United Airlines an HRO when it comes to customer service? In the summer of 2009, a seemingly routine customer service complaint about damaged luggage (in this case, a guitar) by a passenger became a global public relations fiasco when musician Dave Carroll released the YouTube video "United Breaks Guitars" detailing his travails on United and subsequently with their customer service department. The video has been watched more than 11 million<sup>1</sup> times and was the first video of a three-part series created by the musician.

"United Breaks Guitars" sparked a deluge of news articles, blog posts, and discussion on social media as customers responded to the video. Ultimately, United rebounded a bit with clever responses and the decision to use the video for internal training purposes. However, it was too little too late as the damage to the company had been done. Although it is hard to quantify the precise impact of the video,

---

<sup>1</sup> Source: YouTube - <http://www.youtube.com/watch?v=5YGc4zOqozo> 11,064,571 as of 11/1/11

one article suggested that the “United Breaks Guitars” video resulted in more than a \$100 million drop in the company’s market capitalization<sup>2</sup>. On a much smaller scale, it became easier for students in my undergraduate and graduate classes to remember Dave Carroll’s video than one of United’s advertisements, which is why I use the incident to teach about high reliability organizations in my IMC classes. Since the “United Breaks Guitars” video debuted, Dave Carroll’s music career has flourished and he has become an iconic customer advocate. Meanwhile, United had to repair the reputational damage from the viral videos. “United Breaks Guitars” is a powerful example to begin to understand the principles of high reliability organizing and their implications for IMC practitioners.

### **Strong responses to weak signals – an introduction to the HRO principles**

High reliability organizations face unexpected events on a daily basis but are able to reliably function and navigate through them (Weick and Sutcliffe, 2007). There is a rich literature in organizational theory on high reliability organizations which originated in studies of aircraft carriers, firefighters, and other contexts where unexpected events had life-and-death consequences (Rochlin, LaPorte, and Roberts, 1987; Weick, 1987; Roberts and Rousseau, 1989; Weick, Sutcliffe, and Obstfeld, 2005). One of the hallmarks of HROs is that they have strong responses to weak signals (Weick and Sutcliffe, 2007). It is natural to have a weak response to a seemingly small occurrence, but HROs recognize the dangers that small events can pose if not addressed in a convincing manner. This is one of the main ideas that Karl Weick and Kathleen Sutcliffe have articulated in their research

---

<sup>2</sup> Source: Ayres, C. (2009). “Revenge is best served cold – on YouTube” *The Sunday Times*. July 22, 2009

on HROs and in their book, *Managing the Unexpected*. Weick and Sutcliffe are professors at the University of Michigan's Ross School of Business and thought leaders in the area of high reliability.

Weick and Sutcliffe's (2007) addition of five principles for high reliability organizing provides a framework for managing unexpected events. The first principle is "preoccupation with failure," in which the organization articulates the types of mistakes they cannot afford to make. The second principle is "reluctance to simplify," which emphasizes the importance of understanding the nuances of a situation or event. The third principle is "sensitivity to operations," which stresses the need to understand what is happening where the organization connects with its constituents. The fourth principle is "deference to expertise," which emphasizes that the right person to make decisions when an unexpected event occurs varies based on the situation and is not always dependent on organizational experience. The final principle is "commitment to resilience," which illuminates the importance of continuing to function and move forward in the midst of managing unexpected events. In sum, these principles help an organization to take a mindful approach to organizing with a focus on updating its understanding of the environment.

### **HRO principles in action at United**

Revisiting "United Breaks Guitars," one needs to be careful not to revert to hindsight bias and suggest that the situation could have been easily avoided. However, if United is preoccupied with failure from a customer service perspective, this is the type of mistake the company did not want to make. Sensitivity to operations shifts the focus to the front lines of the initial agents interacting with Carroll who were the closest to the actual event. There would have been a reluctance to label this as a routine customer service complaint as Carroll is a musician who lost his guitar. A strong response to Carroll's initial request would have consisted of United not only covering his costs, but also giving him a travel voucher. The financial cost would have been nominal and perhaps would have resulted in a different YouTube video – "United Repairs Guitars." To its

credit, once the video surfaced, United was resilient and remedied the situation with a donation to a charity of Carroll's choice and deferred to him as the expert by using his videos to educate the company on customer service.

It is important to note that the financial resources required to have strong responses to all of the weak signals United receives on a regular basis in the customer service department would be considerable. However, it is equally vital to understand the quality of attention required to navigate the Carroll situation and how it contrasted to what actually happened. Given the large discrepancy between the two, it is helpful to think about small wins in moving towards the ideal response. A small win is "a concrete, complete, implemented outcome of moderate importance" (Weick 1984, page 43). United's response to the video was a small win for the company as it showed a sense of humor in the heat of the moment: "This has struck a chord with us....Dave Carroll's excellent video provides United with a unique learning opportunity that we would like to use for training purposes to ensure all customers receive better service from us."<sup>3</sup>

### **Implications of the HRO principles for IMC practitioners**

Given IMC's customer-centric approach, it is helpful to consider the nuances of the HRO principles in the context of IMC. IMC practitioners need to recognize the danger that seemingly insignificant disputes with customers can have in terms of the overall impact on the company. They need to understand what is happening at all customer touch points – balancing their internal knowledge from research and development with the reality of their customer's experiences. Rather than be ready to simplify the interpretations of the customer responses, they need to be careful to understand what the exact problem might be. Once an unexpected event starts, the company needs to welcome customers into the conversation as they may be the ones with the deepest familiarity of the

---

<sup>3</sup> Fisher, L. (2009) "Musician Makes Music Out of Feud With United Airlines" ABCNews.com July 9, 2009 <http://abcnews.go.com/Entertainment/Business/story?id=8043639&page=1>

situation. Finally, the company must learn from the unexpected events to be prepared for new ones in the future. These are just some initial ways to interpret the HRO principles to IMC practice.

In November 2011, nearly 2.5 years since the “United Breaks Guitars” incident, the importance of high reliability principles for IMC practitioners is even more vital. In recent months single tweets from customers – messages sent through the micro blogging site Twitter – have necessitated responses from CEOs of publicly-traded companies. One example of a strong response to a weak signal was well-documented on the *Consumerist* blog when popular food chain Chipotle was criticized for cooking their pinto beans in pork without noting that preparation method on its menu.<sup>4</sup> The initial tweet by a non-pork eating customer (who is also the editor of a popular men’s magazine) was sent to Chipotle and received an immediate response including a phone call from the company’s CEO. The CEO conveyed Chipotle’s plans to change the menu to be more transparent because of the one customer’s tweet. This strong response represents an impressive example of high reliability organizing in today’s Integrated Marketing Communications environment.

### **High-reliability organizing in the IMC classroom**

For the past two years, I have assigned *Managing the Unexpected*, which translates the HRO academic research into principles for a professional audience, in my IMC classes. In addition to learning from the vast range of contexts that students were able to apply the principles for class assignments, I have been inspired by the unintended benefits from teaching this material in the Managing Integration graduate class and Introduction to Public Relations undergraduate class.

Students have emailed me several months after the class to tell me about how they have been influenced by learning about high reliability organizations. One graduate student said, “I explained to the group about you and your classes, and how the lessons learned there really motivated me to think

---

<sup>4</sup>Popken, B. (2011) “Tweets Get Chipotle To Change Menus To Show Pinto Beans Cooked With Bacon” August 17, 2011 *Consumerist* <http://consumerist.com/2011/08/tweets-get-chipotle-to-change-menus-to-show-pinto-beans-cooked-with-bacon.html>

differently about the jobs I was searching for.” Another graduate student relayed that a discussion of what failure meant to the organization in his interview was one of the reasons he was chosen for a position. The student emailed, “There were, of course, a handful of things, and one of them was the insightful questions I asked about how the company works—especially the curiosity about defining and confronting failure. No one has ever asked something like that before.”

I hope this article will inspire IMC practitioners and academics to start thinking about what the HRO principles involve in their environment and how they can be better prepared to manage unexpected events by applying them. I believe five years from now that the field of IMC will have taken several steps to understand the importance of reliability. I am hopeful that this article is a “small win” in moving that understanding forward.

## References

- Roberts, K.H.; Rousseau, D.M. (1989). “Research in nearly failure-free, high-reliability organizations: having the bubble.” *IEEE Transactions on Engineering Management*. Vol.36: 132-139.
- Rochlin, G. I., LaPorte, T. R., & Roberts, K. H. (1987). “The self-designing high-reliability organization: Aircraft carrier flight operations at sea.” *Naval War College Review*, pp. 76-90.
- Weick, K. E. (1984). "Small Wins: Redefining the Scale of Social Problems." *American Psychologist*. Vol. 39: 40-49.
- Weick, K. E. (1987). “Organizational culture as a source of high reliability.” *California Management Review*. Vol. 29: 112-127.
- Weick, K. E. & Sutcliffe, K. M. (2007). *Managing the unexpected: Resilient performance in an age of uncertainty*. 2nd Edition. San Francisco: Jossey-Bass.

Weick, K.E., Sutcliffe, K.M., & Obstfeld, D. (2005). "Organizing and the Process of Sensemaking." *Organization Science*. Vol. 16: 409-421.

### **Acknowledgements**

I am grateful to Clarke Caywood, Nancy Hobor, and Stephanie Slovak for their helpful feedback and comments on this paper.

### **Bio**

Daniel Gruber is an Assistant Professor of Integrated Marketing Communications in the Medill School and Courtesy Professor of Management & Organizations in the Kellogg School of Management at Northwestern University. Before joining the faculty in 2009, Dan completed his Ph.D. in business administration at the University of Michigan's Ross School of Business. Dan's research focuses on organizational sensemaking, the media industry and managing integration. His teaching centers on strategic communications, organizational change and leading media companies. Dan is a graduate of Washington University, where he earned his undergraduate degree in business administration and of Cornell University, where he completed a Master's degree in business administration and a Master's degree in industrial and labor relations. Dan has worked for media and financial services companies and has won teaching awards at Northwestern University and the University of Michigan.