



Oral History Overview

INTRODUCTION

The insights of leaders, employees and customers are a critical way to capture the experience and historical record of an organization. They provide a unique window into a company as it exists today and in the recent past, providing a “living history” of the personalities of memorable individuals, what it’s like to work for a company, and how the company has reacted to outside events that shape and define an industry. Preserving that knowledge through oral history interviews is a proven way to ensure the knowledge and experience of key individuals is captured and available for future use by an organization.

Oral History Defined

Oral histories are a recording of living people’s recollections of their own life and work experiences. They can be recorded using audio or video and usually result in a transcribed historical record of the interview. While an oral history is a conversation between interviewee and interviewer, the interviewer must nonetheless conduct preliminary research and give thought to the project’s goals in order to produce the best results.

There is never a bad time to conduct oral histories, but there are specific moments when many organizations decide to undertake an oral history program. These can include, but are not limited to, the pending retirements of key executives, before or after a merger, during an anniversary, after a period of great change, or after the achievement of an important corporate milestone.

The anecdotes and information obtained through the interviews form a knowledge base that can be used in a variety of ways: during leadership transition, corporate culture development, employee training and promotional video productions, and exhibits and advertising.



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THE ORAL HISTORY PROCESS

There are a number of steps that must be completed when conducting an oral history program, although often many steps occur simultaneously.

- Project Planning
- Background Research
- Interview Scheduling and Coordination
- Conduct Interview
- Transcription and Reviews

Selecting Interviewees

An effective oral history program is implemented over time and should capture a broad and diverse perspective on the company's history. Consideration for an initial list of interviewees should take this into account but should also consider the need to capture insights and content for near term programs and the risk that valuable experience may be lost.

Oral history candidates should be considered based on their firsthand knowledge of subjects and experiences that have directly impacted the past and potentially the future of an organization. Ideally, candidates will have good recollection skills and be willing to participate in the program.

Oral histories may be conducted with a wide range of individuals who have a direct relationship to an organization. These often include the following:

- Executive leadership, past and present
- Board members, past and present
- Strategic managers who have led critical initiatives
- Line of business leaders
- Leaders with specific knowledge or perspective around pivot points in the organizations
- Internal thought leaders
- Strategic clients
- Long standing partners and suppliers



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THE ORAL HISTORY PROCESS

Individual Interview

Another decision to be made when selecting interviewees is whether to interview them individually or as a group. Each format creates a unique dynamic with pros and cons. A successful one-on-one interview creates a bond between interviewee and interviewer that may surface more in-depth information or stories that have never been shared before. The focus on the sole interviewee also gives shyer personalities a chance to blossom. For these reasons, History Factory also strongly suggests that you minimize the number of people present in the room.

The absence of observers is important for the comfort of the interviewee. A shorter interview—as opposed to a more formal oral history—may be the appropriate choice for higher-level executives when the project coordinator must balance their limited availability with the depth or breadth of topics to be covered.

Group Interview

A group interview can be useful when discussing a particular event or moment in time experienced by all members of the group. The dynamics of the group can help challenge inaccuracies among individual memories and create a more nuanced group recollection of the event. A group interview does run the risk of being hijacked by a dominant personality, which a skilled interviewer will need to work around. The group interview also does not yield the same sense of intimacy, which may result in self-censoring among participants.