

Human Resource Agent Facilitation and Unlearning of Legacy Practices: A Conceptual Examination of Organizational Change and Renewal

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ABSTRACT

In companies that are confronted with turbulence and rapid change, there is a long-term challenge: the routines, structures, and assumptions that have made them successful often end up stifling their development and even their demise. This article looks at how the human resource (HR) function can be a facilitator for the intentional unlearning of legacy practices – obsolete policies, mental models, routines, and institutionalised behaviours that remain in the organization despite their threat to its relevance or usefulness. A conceptual and integrative literature review methodology was adopted, and the organizational learning theory, change management scholarship and strategic human resource management literature was synthesized to provide an integrated framework for understanding the role of HR practitioners as internal change agents to catalyse organizational unlearning as a prerequisite to genuine renewal and transformation. The article draws on the theoretical concepts of Organizational Unlearning Theory, Ulrich's Human Resource Business Partner Model and Institutional Theory to highlight the cognitive, structural and normative aspects of persistence of legacy practice and the role of the HR agency in facilitating unlearning. The reviewed literature shows that unlearning is not just the voluntary disappearance of old knowledge, but it is an active process of change, which is sometimes uncomfortable and politically charged, and therefore must be taken over deliberately, safely and institutionally. As an interface between the organization and the outside world, the HR function can be used to discover legacy practices, diagnose the causes of their persistence, and develop interventions such as targeted communication, incentive realignment, structured reflection, and leadership development that will help individuals and collectives let go of irrelevant practices in exchange for relevant practices. The implications for HR practitioners, organizational leaders and scholars from the theoretical, practical and policy perspectives are explored in the end, and recommendations are made for the adoption of unlearning facilitation as a strategic competency for HR.

RESEARCH ARTICLE

KEYWORDS: *Human Resource Management, Organizational Unlearning, Change Agent, Legacy Practices, Organizational Renewal, HR Business Partnering*

1. Introduction

Survival and competitiveness of an organisation are increasingly not only about taking up new knowledge and skills but also about shedding old ones in the modern business environment. As companies build up experience, they tend to accumulate routines, assumptions and practices that are considered a source of competitive advantage, but over time can become "legacy" practices or "legacy systems" (Hedberg, 1981; Tsang & Zahra, 2008) that operate as if they had always been the way they are. These are forgotten practices, e.g. hiring processes, organizational structure, performance assessments, compensation philosophies, which may persist after the senses that underpinned them are no longer valid due to technological changes, changes in the structure of the market, or the expectations of the workforce. The human resource (HR) function is a unique function in this overall dynamic.

HR is both a perpetuation of legacy practices and a catalyst for the unlearning of legacy practices as they are housed in policies, practices, and cultural artefacts that govern how work is organized and people are managed. Although this dual positioning has gained increasing research interest in the literature about HR as a change agent (Ulrich, 1997), the ways in which HR practitioners enable the unlearning of legacy practices as opposed to the more widely explored process of enacting new practices is comparatively underdeveloped.

This article fills this gap by presenting a conceptual framework for the understanding of HR agent facilitation of organizational unlearning. It suggests that removing legacy practices is one of the vital prerequisites to success in organizational transformation, but one that may often be overlooked, and that the HR function, with intentional facilitative interventions, can play a meaningful role in helping to speed up this process. The article adds to the conversation of strategic HRM, organizational learning and change facilitation.

2. Statement of the Problem

I have always thought of organizational change in terms of new capabilities and practices becoming established, and the relinquishment of previous practices as a natural and inevitable consequence. A large body of organizational change literature has long focused on learning of new capabilities and practices as the key means of organizational change, and the need to give up old ones as a natural by-product of learning (Argyris & Schön, 1978). This assumption, however, is being disputed more and more.

Research into organizational unlearning has shown that old practices are often continued in parallel with the new ones, creating a state of "institutional friction," employee confusion, and poor performance on change efforts (Akgün, Byrne, Lynn, & Keskin, 2007; Becker, 2010). Groups that don't make an effort to unlearn bad habits can end up with new systems, technology, or strategies that are sabotaged by the lingering presence and operation of old routines and mental models. Although this is a meaningful problem in practice, there has been little conceptual focus on the specific role that internal agents (human resource practitioners) legitimate authority over the practice of the organization plays in facilitating unlearning.

In the existing HR change agent literature, the focus is on the introduction of new HR practices, or on the management of change resistance in general, but not on the specific cognitive, emotional and political processes by which organizational members need to give up practices to which they have become accustomed. In this article, we will consider this

conceptual shortfall and explore how deliberate HR agent facilitation can be designed to help unlearn legacy practices as a unique organizational capability.

CONCEPTUAL FRAMEWORK

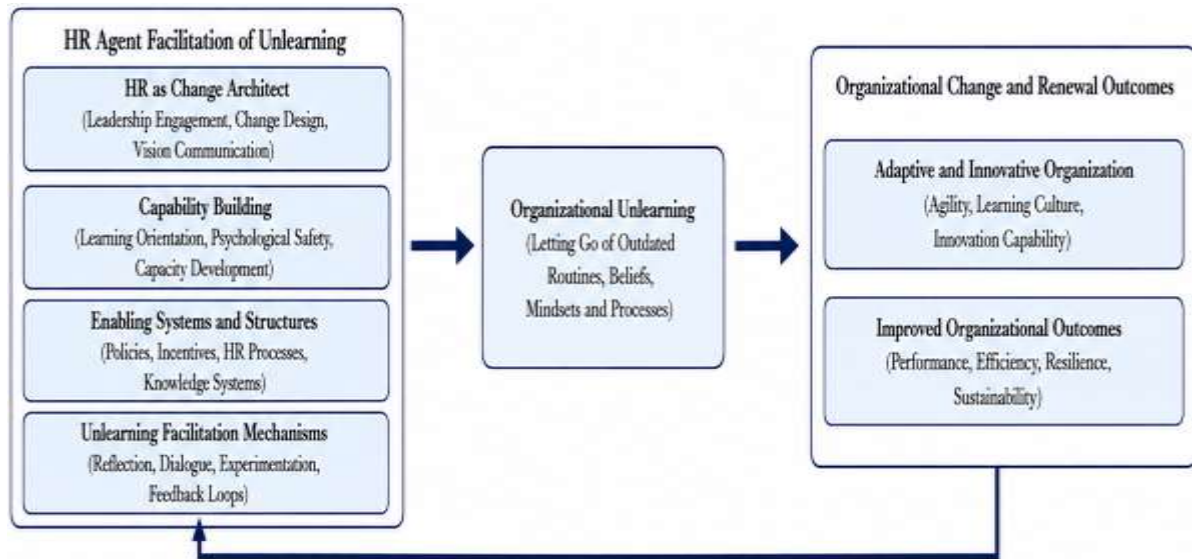


FIGURE 1: Conceptual Framework on Human Resource Agent Facilitation and Unlearning of Legacy Practices. **SOURCES:** Tsang and Zahra (2008); Becker (2010); Sydow et al. (2009)

3. Objectives of the Study

This article pursues the following objectives:

1. To conceptually clarify the constructs of organizational unlearning and legacy practice persistence within the human resource management literature.
2. To examine the theoretical foundations explaining why legacy practices persist within organizations despite diminishing utility.
3. To articulate the specific facilitative roles that HR practitioners, as internal change agents, can play in enabling organizational unlearning.
4. To identify practical mechanisms and interventions through which HR functions can operationalize unlearning facilitation.
5. To derive theoretical, practical, and policy implications for embedding unlearning facilitation within strategic human resource management practice.

4. Literature Review

4.1 Conceptualizing Organizational Unlearning

Organizational unlearning is defined as the intentional and conscious process of organization discarding out of date knowledge, routs and beliefs which no longer align with the strategic goals of the organization and thus make space for new learning to take place (Hedberg, 1981). Organizational unlearning is well documented as an active, conscious act of

giving up embedded practices, in contrast to individual forgetting which can take place passively through the process of forgetting or memory decay (Tsang & Zahra, 2008). Becker (2010) also identifies unlearning at individual cognition, group routines, and organizational systems, indicating that legacy practices can become part of the individual, group and organizational systems, and therefore, multi-level interventions are necessary.

It is important to point out here that unlearning is not the same as forgetting information but the conscious, active abandonment of information-based behavioural routines and interpretive frameworks that have become entrenched in the organizational life (Akgün et al., 2007). This is important for HR practice because it suggests that the unlearning interventions need to go further than just changing the formal policies, they need to target the informal taken-for-granted assumptions that support legacy behaviours, even after formal policies have undergone a change.

4.2 Legacy Practices and Their Persistence

Legacy practices are typically described as organizational practices, structures or behaviour, which are still performed even if their original strategic function or their incorporation into an organization has been formally replaced by more recent practices (Sydow, Schreyögg, & Koch, 2009). Several interrelated mechanisms have been suggested as causing the persistence of these practices: “path dependency” that is the self-reinforcing effect of early organizational decisions; “sunk costs” that is the feeling of having sunk costs and therefore not wanting to abandon existing systems; and “institutional isomorphism” that involves mimicking existing practices to gain legitimacy in one's institutional environment (DiMaggio & Powell, 1983).

In HRM in particular, old fashioned approaches often take the form of the continued use of seniority-based promotion systems despite the formal implementation of competency models, the continued reliance on annual performance appraisal systems, despite the formal implementation of ongoing feedback systems, and the continuation of hierarchical decision-making despite the formal implementation of flatter organizational structures. The following are examples of decoupling, a situation where formally enacted practices exist symbolically, but actually, the behaviours that govern them are still governed by the old routines (Meyer & Rowan, 1977).

4.3 The Human Resource Function as Change Agent

The HR model as a change agent has greatly been influenced by HR business partner model proposed by Ulrich (1997) as one of four roles HR needs to play as a strategic HR, including strategic partner, administrative expert, and employee champion. HR practitioners serve as change agents, responsible for developing the capacity of the organization for change, handling the human factors of the change processes and making sure that the new strategic initiatives are translated into lasting behavioural changes (Ulrich & Brockbank, 2005).

The literature on change agents, however, has been more focused on the role of HR in supporting the introduction of new practices (e.g. new performance management systems or organizational restructuring) while comparatively less theoretic attention has been focused on the role of HR in supporting the deliberate unlearning of practices that underlie or accompany the introduction of new practices. This article argues that unlearning facilitation is an important and not widely recognised facet of HR change agency, that there are particular skills to master in understanding why legacy practice persists, in managing the emotional and

identity aspects of 'leaving the practice' and that there are specific skills associated with designing structured unlearning interventions.

4.4 Barriers to Unlearning: Cognitive, Emotional, and Political Dimensions

There are many interrelated barriers to organizational unlearning identified in the literature. On the cognitive level, people build mental models and schemas that help them to make sense of complex organizations, and when those models and schemas are disturbed, even though the practices within them may appear obviously redundant, there can be a lot of cognitive discomfort and resistance (Starbuck, 1996). Legacy practices are often intertwined with one's own and collective identity, which is why their loss can be felt in terms of a loss of professional competence, status or organization membership (Huy, 1999).

Legacy practices can also be the result of political legacy, as the continuation of certain practices represents political resistance from actors who gain power, resources or legitimacy from the current status quo (Pfeffer, 1981). They illustrate that rational communication of the need to change is insufficient to ensure unlearning takes place; it is necessary to consider the cognitive, emotional and political aspects of the legacy of practice persistence and ensure that interventions are carefully designed and multi-pronged.

4.5 Empirical Insights on Unlearning Facilitation

Although there are fewer empirical studies on organizational unlearning than there are on organizational learning in general, these can inform us about good facilitation. Akgün et al (2007) discovered that organizations which created formal processes to bring out and challenge their current practices, like after action reviews and structured reflection sessions, showed greater achievement at successfully unlearning than those that did not have a formal process in place or that approached such processes in an informal or ad hoc way. Likewise, research into organisational change readiness has revealed that psychological safety, which is a shared belief in the team that it is safe to take interpersonal risks (Edmondson, 1999), is closely linked to the willingness of employees to question and abandon some of their accepted work practices without the risk of social or professional condemnation.

In the context of HRM, there has been research on the role of HR business partners in the process of organizational transformation projects, with studies indicating that HR practitioners who engage in building relationships, understanding the needs of stakeholders and communicating clearly about the rationale for change are better at supporting a culture of leaving behind legacy practice than those who simply rely on formal policy directives (Caldwell, 2001). This discovery highlights the relational and facilitative – not just administrative – role of effective HR change agency in the context of unlearning.

5. Theoretical Framework

This article uses three complementary theoretical frameworks to account for how and how HR agents facilitate unlearning in the organization..

5.1 Organizational Unlearning Theory

This article is grounded in the theoretical work of Organizational Unlearning Theory (OUT), which was first introduced by Hedberg (1981) and later further developed by others like Tsang and Zahra (2008). This theory focuses on the processes (such as challenging institutionalized routines, reflecting on them in a structured way, and unfreezing old mental

models) by which organizations shed obsolete practices, and thus offers a foundation for the understanding of the substantive content of HR facilitation interventions.

5.2 Ulrich's Human Resource Business Partner Model

Ulrich's (1997) HR Business Partner Model suggests there are four interrelated roles for the strategic HR: Strategic Partner, Administrative Expert, Employee Champion, and Change Agent. The article focuses specifically on the change agent component of the model to theorize the structural and role-based legitimacy that gives HR practitioners a role in supporting abandonment of practices, and on the employee champion component to consider the need to attend to the emotional and identity-based dimensions of practice abandonment among affected employees.

5.3 Institutional Theory

The concepts of institutional isomorphism (DiMaggio & Powell, 1983) and of decoupling (Meyer & Rowan, 1977) offer a complementary perspective on the reasons why legacy practices continue with organizational change, and what it takes to unlearn those legacy practices, by focusing on formal policy architecture as well as the informal normative and cognitive structures that support legacy behaviour. This theoretical approach is especially useful in the formulation of the paradox that organizations can formally implement new HR practices, yet informal practices persist, highlighting the importance of HR facilitation efforts which go beyond the formal updating of policies to include a change in behavior and norms.

6. Methodology

According to the conceptual and integrative literature review methodology used in this article, it is seen that the theoretical and empirical work of the disciplines of organizational learning, strategic human resource management, change management and institutional theory are synthesized. The review process has comprised systematic identification and thematic analysis of peer-reviewed journal articles and foundational theoretical texts related to organizational unlearning, legacy practice persistence and HR change agency, focusing on literature published in the organizational behaviour, human resource management and organizational theory fields. This integrative approach is suitable for the creation of a new conceptual model about a phenomenon in which direct empirical study is scarce, focused on HR and the unlearning process, and is aimed at offering a solid theoretical basis for future empirical research.

7. Discussion: Toward a Framework of HR Agent Facilitation of Unlearning

7.1 Diagnostic Facilitation: Identifying Legacy Practices

A diagnostic facilitation is a process that helps identify legacy practices. A process for identifying legacy practices is diagnostic facilitation. HR agents' role as the facilitator starts with the diagnostic – a systematic process of identifying legacy practices in the organisation that may be influencing key aspects of the business, even when formal policy changes have been made. This diagnostic function involves HR practitioners creating and implementing instruments like practice audits, employee surveys, and structured interviews that can uncover the disconnect between what is said and done. Another important distinction that HR agents should make in effective diagnosis is that between those legacy practices that may persist because they are still useful and those that have come to stay because of inertia. This is important to make when deciding which practices to prioritize for unlearning interventions.

7.2 Cognitive Facilitation: Unfreezing Mental Models

Drawing on Lewin's (1947) 'unfreezing, changing and refreezing' theory of organizational change, HR agents have a crucial role of cognitive facilitation in making the organizational members aware of the obsolescence of their existing mental models and routines. This can be done with formal reflection sessions, exposure to disconfirming information (e.g., comparing with benchmarking data, for example, that show that alternative practices are working well), and through facilitated dialogue that brings and challenges taken-for-granted assumptions about legacy practices. Importantly, this cognitive facilitation should be done in a way that doesn't elicit defensive responses, using the principles of psychological safety (Edmondson, 1999) to set the stage for employees to offer critical evaluations of existing practices without fear of being blamed or punished.

7.3 Emotional and Identity Facilitation

Legacy practices are often tied to professional identity and status, and HR agents need to be sensitive to the emotional aspects of unlearning too. This means recognizing and accepting the sentiment of loss that can arise when leaving accustomed practices, offering transitional support, such as retraining and reskilling programs, and framing unlearning not as an eviction of previous skills and abilities, but as a normal and required aspect of professional and organizational growth. When HR facilitates change communication that explicitly recognizes employees' previous contributions and provides an argument for change, then resistance to change is lessened and employees engage in unlearning processes more fully (Huy, 1999).

7.4 Structural and Incentive Facilitation

In addition to cognitive and emotional support, HR agents should tackle legacy systems and incentives. This entails the redesign of performance measures and reward mechanisms that can actually encourage the continuation of old behaviours, repurposing reporting lines and decision authority that perpetuate old hierarchies, and incorporating new practices into formal HR systems and processes such as recruitment, performance management and career development systems, rather than simply using them as symbolic statements of policy that are disconnected from practice (Meyer & Rowan, 1977).

7.5 Political Facilitation: Managing Stakeholder Interests

Lastly, HR agents have to deal with the political aspects of unlearning, engaging stakeholders whose interests are tied to legacy practices and identifying those practices. That calls for using stakeholder analysis techniques, coalition building to gain the support of influential organizational actors, and, if needed, the legitimate use of organizational authority to ensure that practices are discontinued even if they continue to be informally supported but are no longer beneficial to the organization's goals. Effective political facilitation also demands that HR agents have credibility and perceived neutrality, in order to assume the role of an HR steward of organizational effectiveness, as opposed to an HQ stakeholder in an organizational internal struggle.

8. Implications for Theory and Practice

This article advances theory by introducing a new dimension of HR practice into HR change agent construct, namely unlearning facilitation, which has not been explicitly discussed in the literature, where the focus has been considerably on adoption of new practice. The article outlines a multi-dimensional approach to unlearning facilitation,

combining Organizational Unlearning Theory, Ulrich's HR Business Partner Model and Institutional Theory, thus addressing the cognitive, emotional, structural, and political aspects.

The framework proposes that the HR department, if it wants to strengthen its ability to be agile and renew the organization, should intentionally develop unlearning facilitation as an HRBP competence and embed the tools for identifying legacy practices, structured cognitive and emotional facilitation methods and the systematic attention to the structural and political aspects of practice change. Organizational leaders, in turn, should acknowledge and invest in the role of the HR function as facilitator of unlearning, giving HR practitioners the authority and legitimacy to question the status quo, including when senior or influential stakeholders are promoting the status quo.

9. Recommendations

The following recommendations are made based on what has been found in the above analysis:

1. It is important for organisations to officially embed unlearning facilitation as a formal competency within HR business partner job descriptions and professional development plans.
2. HR functions should establish and implement systematic diagnostic tools, like practice audit and decoupling assessment, to systematically detect the legacy practice in the organization.
3. HR professionals need to learn facilitation skills that will respond to the cognitive, emotional and political aspects of unlearning, not just formal policy communications.
4. Organizations should create safe environments, including after-action reviews and structured reflection sessions, for staff to reflect and let go of outdated practices without risk of repercussion.
5. Performance management and reward systems need to be regularly reviewed to guarantee consistency with new practices; leaving behind traditional incentive systems as informal ways of operation.
6. Empirical studies should further investigate the impact of HR-supported unlearning interventions on measurable organizational outcomes such as successful change implementation and organizational agility in other industry and cultural settings in the future.

10. Conclusion

Organizations' ability to adapt to changing environmental needs relies heavily on their ability to unlearn old practices that may have been effective in the past but are no longer. It has been suggested in this article that the human resource function is well placed to support this unlearning process due to its structural position and legitimate power in relation to the practice architecture of the organisation.

The article is based on the concepts of Organizational Unlearning Theory, Ulrich's HR Business Partner Model and Institutional Theory, and has created a multi dimensional framework that defines the role of HR agents in the facilitation of organizational unlearning

in terms of diagnostic, cognitive, emotional, structural and political roles. In the face of persistent and fast-paced technological, economic and social shifts, intentional efforts to develop HR-empowered unlearning capacity will be even more important to ensuring organizational relevance, agility and competitiveness in the future.

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