

The Power of Tools in Qualitative Analysis

A lesson in pedantry

Excellence in Management Education

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Empirical

- Competing strategic goals
- Complex 'grand' challenges
- Strategy-as-practice
- Paradox
- Emotions in organisations
- Organisational change

"how people in organizations experience and respond to strategic complexity"

Methodological

- Ethnographic writing
- Process research
- Innovation
- Access
- Research tools

"quality in qualitative methods"



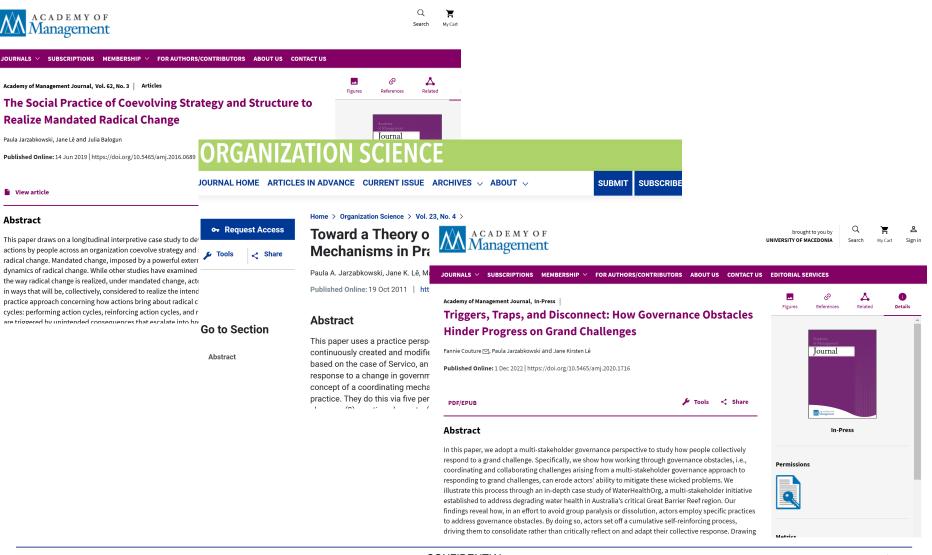
Empirical Data

- Interviews: 600+
- Meeting Observations: 500+
- Field Ethnography: 40+
- Documents: 10,000+
- Also: Questionnaire design, focus groups, group interviews (...)

Core Focus: Real-time interpretive longitudinal observation-based research



Empirical Outputs



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Methods Outputs



analysis, we develop a two-layered "iceberg" model of method innovation, which shows that important principles guide the innovative use of organizational research tools. These principles $^{\sim}$ are engaging in holistic innovation, being excruciatingly clear in the presentation of methods, developing theory and method together, and being reflexive in innovating methods. Our model demystifies the largely implicit process of innovating research methods. We hope it serves to Innovating Research orient and encourage a more creative use of methods in future studies.

Strategic Organization

Journal Home	Browse Journal V Journal Info V Stay Connected V Submit Paper
Close A	Producing persuasive findings: Demystifying ethnographic textwork in strategy and organization research Paula Jarzabkowski, Rebecca Bednarek, Jane K Lê
i PDF 🔣	First Published October 9, 2014 Research Article Revealed Check for updates https://doi.org/10.1177/1476127014554575
EPUB	Article information ~
off campus can be a ibrary can solve it ILibrary Ishing Company	Abstract Despite the importance and proliferation of ethnography in strategy and organization research, the central issue of how to present ethnographic findings has rarely been discussed. Yet, the narratives we craft to share our experience of the field are at the heart of ethnographic papers and provide the primary basis for our theorizing. In this article, we explain the "textwork"
e	involved in writing persuasive findings. We provide an illustrative example of ethnographic data

as it is recorded within fieldnotes and explain the necessary conceptual and writing work that ^ must be done to render such data persuasive, drawing on published exemplars of ethnographic CONFIDENTIAL

24 March 2023 7



Editorial Work

Organizational Rese Methods		ADVANCING METHODOLOGICAL THOUGHT AND PRACTICE
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 Introduction: Is It all a Game? Rankings, Journal Lists, and the Contemporary Role of Book Chapters



My Research Approach

Key characteristics and tools

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- Pedantic
- Pragmatic
- Eclectic
- Innovative
- Hands-on
- (Impactful)

...and someone who loves teaching others!

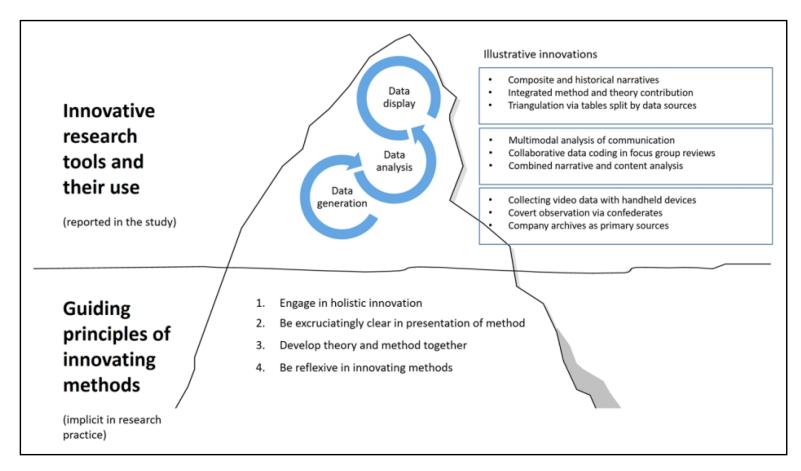


Figure 1. Innovating research methods as two-layered process ("innovation iceberg").

Lê & Schmid (2022)



- Thick description
- Critical events // Steps // Stages
- Keywords // Recurrences // Themes // Construct development
- Sensitising concepts // Core constructs
- Vignette
- Composite narratives
- Visualization // Modelling // Tables



Research Tools

Getting your hands dirty

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Thick Description

- Geertz (1973), The interpretation of culture
- Ethnographic description
- Four characteristics
 - it is interpretive
 - what it is interpretive of is the flow of social discourse
 - the interpreting involved consists in trying to rescue the "said" of such discourse from its perishing occasions and fix it in perusable terms
 - it is microscopic



E2E Data Story Month One

BACKGROUND

From xxxx to xxxx, Servico will be implementing a major change in regulatory policy based on Equivalence, arising from the XXX Review, with the major changes taking place during xxxx. These changes require Servico to implement a number of legallybinding regulation, including developing a new, ring-fenced division, Distribution, comprising 30,000 people who are involved in the delivery of its core services. While DISTRIBUTION remains under the corporate SERVICO structure, it must operate independently; providing equal access to the distribution networks to all industry players without favoring downstream SERVICO businesses. A critical aspect of equivalence is that DISTRIBUTION should not share any commercial information with downstream SERVICO businesses, or allow its decision-making to be affected by SERVICO commercial objectives, albeit that it may communicate across boundaries for non-commercial and operational interactions, providing that these do not favor the internal SERVICO LoBs. SERVICO also has to separate all the products it currently offers to end-users through its integrated value chain, so that these can be traded on a transparent (equivalent) market basis between DISTRIBUTION and the other SERVICO LoBs. Separation of products also requires separation of the processes, systems and services through which these products are offered. These new regulations, which are intended to mitigate SERVICO's competitive position in areas where its incumbent status have given it significant market power, have ramifications for all of SERVICO's business divisions and for its corporate-level strategy as SERVICO Group. Figure 1 shows the new business structure for SERVICO under the New regulation.

used in Jarzabkowski, Lê & Feldman (2012)



Critical Events // Stages // Periods

- Also called temporal bracketing (Langley, 1999)
- Discrete but connected blocks
- Comparable units of analysis
- Foundation for explanatory mechanisms // process dynamics
- Often separated or spurred by critical events

Critical Events



Appendix 2

Coded CTPs for Corpnet.

No. Month Paradox of organizing		Mutually reinforcing paradoxes of performing/belonging	Actions in response to paradox	Organizing outcomes fuelling next cycle		
3	Corpnet CTP 1 (Month 3) New organizing procedure Distribution and Telco divisions separated by "wall" Distribution is independent; cannot share commercial information with <u>Corporate</u> Divisions must collaborate on new Corpnet product	 New "wall" procedure created the following I. Paradox of <i>performing</i> about <i>different divisional goals</i>; Distribution has regulatory goal of fairness, Corporate has market goal of service 2. Paradox of <i>belonging</i> about <i>values of interaction</i>; Distribution will not work with Corporate on development but Corporate needs this to develop its part 	Splitting. As actors did not know how to engage, they retreated to their own division Specific actions: Work within own boundaries (e.g. plan for fallout) Not engage across divisions (e.g. not share info)	Able to progress work within new divisions via internally focused organizing; but realize some cross- divisional awareness is needed; do not <i>embed</i> splitting into organizing mechanisms		
26	Corpnet CTP 2 (Month 6) New organizing procedure Industry consultation process introduced Increased industry involvement in design Reduced Corporate involvement in design	 New consultation process created the following 1. Paradox of <i>performing</i> about <i>different design process goals</i>; Distribution strives for fair design (distant Corporate involvement), Corporate strives for strong design (close involvement) 2. Paradox of <i>belonging</i> about <i>divisional identity</i>; as major player, Corporate feels it should be closely involved in design, but as independent industry supplier, Distribution feels it should shield against excessive involvement 	Suppressing. Distribution overrides Corporate needs by ignoring design requirements; Corporate could only partially mitigate these actions Specific actions: Fail to account for others' needs (e.g. reduced design) Try to mitigate (e.g. manual solution, working on several product delivery systems)	Able to progress work across divisions by suppressing some goals; but suppression is <i>not embedded</i> within organizing practices as actors see that suppressing produces inadequate delivery elements (insufficient service levels) and must be addressed		
3 10	Corpnet CTP 3 (Month 10) New organizing procedure Creating spec via industry consultation	New PDS spec created the following I. Paradox of <i>performing</i> about <i>different system</i> <i>design goals</i> ; Distribution needs fair PDS (usable by industry), Corporate needs good PDS (usable by them)	Adjusting. Ongoing adjusting to surmount potential impasse; compromise on both sides from .larzabkov	Realize they are unable to progress work within new divisions and need to work across divisions; start interworking on targeted issues wski, Lê & Van de Ven (2013		



- Content coding
- Emerging conceptual categories as the basis for theoretical explanation
- Grounded in data, while abstracted from it
- Bottom up (inductive / grounded coding)
 - (First order = data, second order = meaning, third order = relationship)
- Top down (broad brush / bucket coding)
- Constant comparison
- Memoing

Codes and Nodes

Node Structure

Hierarchical Name

Node

Nodes\\Free Nodes

Nodes\\Free Nodes\\analogies to other industries
Nodes\\Free Nodes\\Dissonance
Nodes\\Free Nodes\\EU Regulation
Nodes\\Free Nodes\\International perspective
Nodes\\Free Nodes\\Numbers
Nodes\\Free Nodes\\Other Regulation
Nodes\\Free Nodes\\Synergy
Nodes\\Free Nodes\\Terminology

Nodes\\Tree Nodes

Nodes\\Tree Nodes\\Central or E2E Management
Nodes\\Tree Nodes\\Central or E2E Management\Wider Feldman E2E
Nodes\\Tree Nodes\\Compliance
Nodes\\Tree Nodes\\Compliance\Breach
Nodes\\Tree Nodes\\Compliance\Non-compliance
Nodes\\Tree Nodes\\Consequences of TSR
Nodes\\Tree Nodes\\Consequences of TSR\BT not broken up
Nodes\\Tree Nodes\\Consequences of TSR\Deregulation
Nodes\\Tree Nodes\\Consequences of TSR\Equivalence
Nodes\\Tree Nodes\\Consequences of TSR\Increased transparency ~ openness
Nodes\\Tree Nodes\\Consequences of TSR\Industry relations

les\\Tree Nodes\\Structural Mechanisms\Annex 2 Status
les\\Tree Nodes\\Structural Mechanisms\Bringing in new people ~ new roles
les\\Tree Nodes\\Structural Mechanisms\Comms
les\\Tree Nodes\\Structural Mechanisms\CSF
les\\Tree Nodes\\Structural Mechanisms\EAO ~ EAB
les\\Tree Nodes\\Structural Mechanisms\Escalation Process ~ OC
les\\Tree Nodes\\Structural Mechanisms\Expert Group
les\\Tree Nodes\\Structural Mechanisms\Group Programme Board
les\\Tree Nodes\\Structural Mechanisms\GRUF
les\\Tree Nodes\\Structural Mechanisms\Industry Forum
les\\Tree Nodes\\Structural Mechanisms\Internal & External Audit
les\\Tree Nodes\\Structural Mechanisms\KPI
les\\Tree Nodes\\Structural Mechanisms\LoB Programme Boards
les\\Tree Nodes\\Structural Mechanisms\Other
les\\Tree Nodes\\Structural Mechanisms\Project Groups ~ Work Packages
les\\Tree Nodes\\Structural Mechanisms\RAG Status ~ Risk Register
les\\Tree Nodes\\Structural Mechanisms\Regulatory Affairs ~ Legal
les\\Tree Nodes\\Structural Mechanisms\Separation Horizontals Verticals
les\\Tree Nodes\\Structural Mechanisms\SOR & CR
les\\Tree Nodes\\Structural Mechanisms\Tactical Solution & Contingency Used in various



- Use 'sensitising concepts' (Blumer, 1969), i.e., conceptual issues which arise out of research interest as point of departure
 - Guide the formulation of interview questions and analysis
 - Developed in relation to the processes defined in their data
 - Should not restrict you (stay open to other ideas/concepts)
- A sensitising concept lacks specification of attributes or bench marks and consequently it does not enable the user to move directly to the instance and its relevant content. Instead, it gives the user a general sense of reference and guidance in approaching empirical instances. Whereas definitive concepts provide prescriptions of what to see, sensitizing concepts merely suggest directions along which to look. (Blumer, 1954: 7)"
- As interpretive devices; starting point for research (Glaser, 1978)
- Charmaz (2003): "background ideas that inform the overall research problem"
- "depends on where the data take us; emergent concepts may supplement or displace them altogether" (Padgett, 2004, p. 301).

End-to-End Coordinating Mechanism

End-to-end management is a term that originates in the supply chain literature and refers to the process of moving a service or product from its initiation in an organization to its delivery-that is, managing all aspects between end points (Cohen and Roussel 2004). End-toend management requires extensive coordinating to connect the elements of a product or a service across the different divisions of an organization through to delivery to a customer (Cohen and Roussel 2004, Foster et al. 2004). For example, for a car manufacturer to provide a customer with a new car, it is important to coordinate the assembly of components such as airbags, doors, and engine parts and processes such as quality control and customer sales between some initial "end point" of organizational entry and a final "end point" of a car in a showroom. End-to-end management is thus an abstract coordinating concept that must be populated with various performances that are enacted as the product or service is accomplished across different parts of an organization. The activities involved in coordinating

Excerpt from Jarzabkowski, Lê & Feldman (2012)



- Commonly used by ethnographers (Carlile, 2002; Jarzabkowski et al., 2012; Jarzabkowski and Kaplan, 2014; Michaud, 2014; Orr, 1996; Rouleau, 2005)
- Vivid portrayals (Erickson, 1986) of specific incidents that illuminate a theoretical concept
- Short evocative stories
- Bring to life concepts by describing an actual event or incident
- A conversation, a routine, a key event
- Often presented as distinct excerpts differentiated from the main
- Evidentiary power via plausible, vivid, and authentic insights into the life-world of the participants, which enables readers to experience the field, at least partially (Erickson, 1986; Golden-Biddle and Locke, 1993; Humphreys, 2005; Humphreys and Watson, 2009).
- Enable balance between the presentation of particularly vivid and rich examples (showing) alongside interpretative explanatory text (telling)
- Supported by a weight of additional data



Vignette

Example 2. Vignette.

The following excerpt highlights the *paradoxical tension* between the market goal of service and the regulatory goal of equivalence (organizing paradox).

A tension-filled meeting. The early morning meeting was a critical one, reviewing progress on the implementation of a major telecommunications product, Lineshare, which is being co-designed by two Servico divisions, Distribution and Retail. The two divisions have alternative goals. While the Distribution division is developing the product for the industry as a whole and therefore aiming to make the product equally useful and accessible to all industry players, Retail is seeking to defend its market objective by ensuring that the product serves its specific needs for service differentiation within the industry. The product has to be "live" and used by some Retail customers by the "BHAG" (big hairy audacious goal) deadline in order to meet regulatory requirements. John is reporting for Retail, Laura is reporting for Distribution

During the meeting Laura asks John for an update; she wants to know how many customers Retail have moved onto the new Lineshare product. John says that they are working on moving a number of "Friendlies," i.e. Servico-friendly customers who are more likely to forgive service disruptions: "these are people like my wife," John jokes, which makes everyone laugh and tease John about giving his wife the product for Christmas. While, there is some progress with the "Friendlies," John also reminds Laura that Retail needs some particular system specifications that have not yet been delivered, before they can actually "go live" with the product. Laura responds that Distribution may not be able to deliver this functionality because "Legal advice is that this particular specification might constitute a competitive advantage for Retail." John is clearly surprised by this comment; the jovial feeling in the meeting quickly dissipating as he disagrees with Laura, saying heatedly: "We are a scale operator; we need this to deliver service!" Speaking firmly, John makes it very clear that Retail cannot compromise on these features and that they will not move customers until these features are available. Both parties appear flustered by the exchange and almost rush out the door at the conclusion of the meeting.

The paradox between divisional goals is clear, with Laura and John posing them as incompatible: They *either* avoid unfair market advantage by not offering these specific features *or* they offer these features but violate fairness values. This is a critical tension point, as they are at an impasse—Retail will not advance the delivery unless market goals are safeguarded through product features

Excerpt from Jarzabkowski, Bednarek & Lê (2014)



Composite Narrative

- Accounts that merge the characters and events from multiple observations into a single narrative (e.g., Jermier, 1985; Smets et al., 2014; Watson, 2000, 2003)
- Aim is to reveal some typical patterns or dynamics found across multiple observations through one particularly vivid, unified tale.
- Aim for an account that is fully revelatory of the pattern and associated conceptual argument
- Draws on wider corpus of data in a "slice-of-life" fashion that remains unfragmented
- A plausible account of the way things work based on their experience of the research participants' world (Cunliffe, 2010; Golden-Biddle and Locke, 1993; Humphreys and Watson, 2009).
- More conceptually generalizable in revealing the patterns at work
- Quality is evidenced through rich description, varied excerpts from the field, and, typically, the presentation of supplementary tables of data, including minivignettes and quotes, that link the narrative to a wider corpus of data



Composite Narrative

Balancing Community and Market Logics in Everyday Underwriting Practice

To illustrate the everyday enactment of these logics in practice, this section presents a composite narrative that exemplifies a "day in the life" of Lloyd's underwriter "Tim" at SafeCo. As explained in the analysis, this composite narrative presents the full breadth and depth of our data within a single evocative story intended to "render the actual-and to do so persuasively" (Van Maanen, 2011: 232). The narrative is based on our thick description of the underwriting practices we identified as stable and pervasive across individuals, firms, and time periods during our 180 days in the field. All examples are taken directly from our observational fieldnotes, and all quotes are verbatim from our fieldnotes and audio recordings. We supplement this narrative with a broader range of representative data extracts in Tables 2a–2c. Underlined instances are later unpacked in a detailed analysis of the mechanisms for segmenting, bridging, and demarcating logics.

Together with the other underwriters and analysts, Tim starts his day with the <u>weekly risk review</u> <u>meeting</u>. Edward, their chief underwriting officer (CUO), hands out a list of last week's deals and asks each underwriter to briefly explain their decisions. Tim took a small share of <u>Integra's</u> new European windstorm deal, which Edward introduces as looking "about the right amount for a deal that is in the market for the first time." Tim explains that Integra has just branched out in Germany with this new deal, but he knows the company well: "It's a good company, but there were some losses in that region from Kyrill [a recent windstorm]. . . . [Some other Lloyd's reinsurers] have been burnt, so best to play it safe until we see how Integra performs there." Another underwriter quizzes Nigel, Tim's analyst, about how he modeled potential losses on a deal with no track record. Nigel and Tim explain the modeling tools and market loss histories they used to substantiate their decision.

Next is a Mexican catastrophe deal, Chicos, which Sam, one of Tim's fellow underwriters, has written. He spread his investment on this year's deal, so that, in case of a loss, SafeCo would have to pay out from a lower threshold. He explains: "We have been on this for a number of years, but we cut back last year [...] because of increased exposure. The broker was keen for us to write a bit more this year." Edward probes: "Why did you spread the investment? What if we take a hit with all the new exposure?" Sam explains that the broker told him Chicos had improved its risk management, and "it seemed to be paying well; I saw the broker over at Adrian's box [a rival Lloyd's reinsurer] so I didn't want to lose it." The other underwriters question how Sam knows the client has improved and Mark raises his voice to insist: "We shouldn't be writing things because Adrian is!" Edward asks if Sam actually knows what others in Lloyd's did, but he cannot give a definite answer. "The atmosphere seems tense. People look

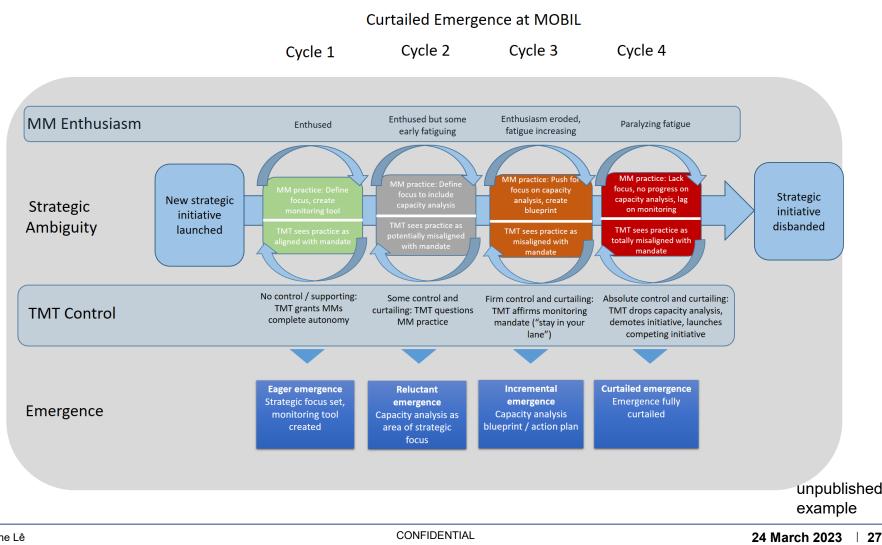
Excerpt from Smets, Jarzabkowski, Burke & Spee (2015)



- Conceptual (process) model as cognitive artifact
- ..."cognitive artifacts" (Norman, 1991: 17)—such as calendars, to-do lists, or computational devices—facilitate various mental processes by extending the capacity of the brain to store and process information (Clark, 2008; Clark & Chalmers, 1998)
- ...the "materialization" of cognitive work
 - ...support cognitive processes
 -support verbal exchanges
 - ... supports the collective construction of new shared understandings
 - ...supports move from individual to collective level
 - ...different from/beyond discursive artifacts

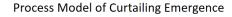
Stigliani, I., & Ravasi, D. (2012). Organizing thoughts and connecting brains: Material practices and the transition from individual to group-level prospective sensemaking. *Academy of Management Journal*, 55.5: 1232-1259

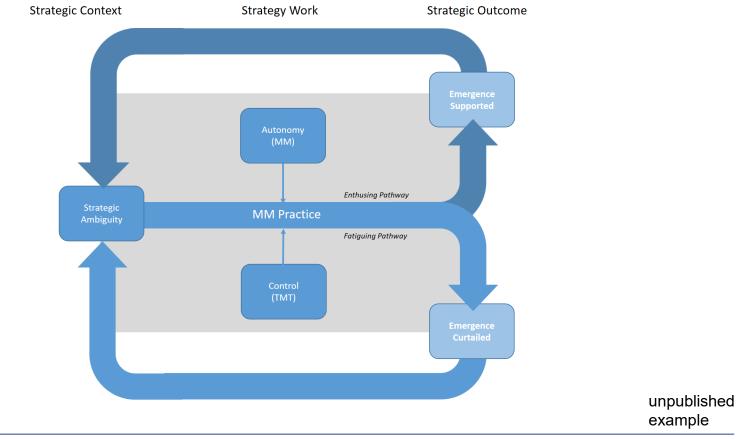
Visualization – Empirical Model





Visualization – Conceptual Model

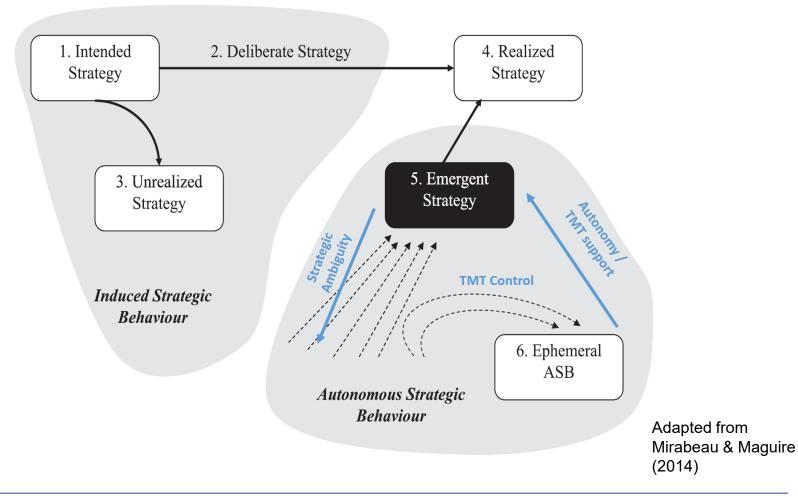




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Visualization – Contribution Model



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... and there are many, many more tools!



What then?

How these tools facilitate publishing

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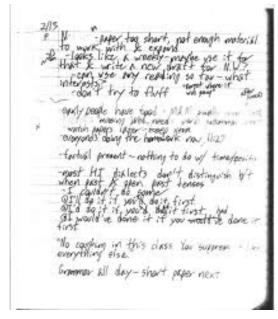


How we went from this...

Dataset

- 246 meeting observations (notes & transcriptions)
- 137 interviews (transcribed)
- 16 days of ethnographic field observations (notes)
- 1000s of documents (all formats!)

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4 779243 MARGARINE LIQUID OLEO	Ben E Keith 4 - 0	GROCERY	0	0	0.00	\$ -	0.00	\$ -	0.00	\$ -	0.00	s -	0.00
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5 286500 Ice Cream Vanilla Cr 3 Gal	Ben E Keith /6 - I		++++++	fl oz		\$ -	0.00	\$ -	0.00	\$ -	0.00	\$ -	0.0
16 650474 KETCHUP FANCY 33% SOLIDS		GROCERY	0	0		\$ -	1.00	\$ 20.69	0.00	\$ -	0.00	\$ -	0.0
7 140005 MUSHROOM WHITE SMALL BUTTON		PRODUCE	0	0		\$ -	1.00	\$ 20.98	0.00	\$ -	0.00	\$ -	0.0
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So you're saying there's a difference maybe between a crown court and a magistrates' court? R: Yeah. I mean the magistrates' court's sort of very just like skirty issues really.

R: Yeah. I mean the magistrates' court's sort of very just like skirty issues really, it just looks at getting things through quickly because it has such a build up of cases to get through.

1: Do you think they're effective in the way they work?

R: I think the magistrates' is the least effective. I think it's hard to expect sort of it to operate when it has somebody with not much legal training making decisions on law. I mean you wouldn't get that in the crown court say because they value the legal training of the judge in those places...so you have like a lesser court so it's just like an appointed position that anyone can have. There's obviously going to be less justice there.

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...to this!



Organization Science

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Toward a Theory of Coordinating: Creating Coordinating Mechanisms in Practice

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This paper uses a practice perspective to study coordinating as dynamic activities that are continuously created and modified in order to enact organizational relationships and activities. It is based on the case of Servico, an organization undergoing a major restructuring of its value chain in response to a change in government regulation. In our case, the actors iterate between the abstract concept of a coordinating mechanism referred to as end-to-end management and its performance in practice. They do this via five performative–ostensive cycles: (1) enacting disruption, (2) orienting to absence, (3) creating elements, (4) forming new patterns, and (5) stabilizing new patterns. These cycles and the relationships between them constitute a process model of coordinating. This model highlights the importance of absence in the coordinating process and demonstrates how experiencing absence shapes subsequent coordinating activity.

Key words: organizing; practice; performative; ostensive; coordination; coordinating



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A Worked Example

Jarzabkowski, Lê & Feldman (2012)

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