

SUB THEME PROPOSAL: ROUTINES, TRANSFER AND TRANSFORMATION (SWG 04 ROUTINE DYNAMICS)

33rd EGOS Colloquium, Copenhagen 2017

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As organizations become increasingly distributed and diverse, and products, technologies and services more complex and dispersed, there is mounting pressure to understand how work can be coordinated across geographical, cultural and intellectual distance, both within and across organizations. As a result, questions arise about how organizational practices and routines can be transferred across organizational and geographic differences and over time.

The metaphor of transfer may conjure up an entity that is moved between two relatively stable contexts. This concept of transfer has often been accompanied by notions of “best practice,” which suggests that practices are independent of their situated enactment and can, therefore, be transferred without being transformed (e.g. Rogers 1995). When routines and practices are theorized as independent of their situated enactment, debate has typically emphasized the need for close reproduction (Winter and Szulanski 2001), which involves stabilizing a practice or routine as a ‘template’ that can be transported from one site to another.

Social practice theory (e.g., Chia and Holt, 2006, Feldman and Orlikowski, 2011, Nicolini, 2013) provides two important ideas that alter our perspective on the transfer of routines. One of these is the potential for variation in the enactment of practices in situ (e.g. Suchman 2007). The other is the idea that stability and change are not dichotomous states of being but mutually constituted processes (Tsoukas and Chia, 2002; Farjoun, 2010). From this perspective, transfer inevitably entails performance and transformation (Latour 1986, Sevón 1996, Gherardi and Nicolini 2000, Bechky 2003, Carlile 2004) despite the goal of precise reproduction.

Routine dynamics (e.g., Feldman and Pentland, 2003) has incorporated these ideas and focused attention on how routines (as practices) are enacted and, thus, created and re-created over time and across organizational locations through the actions of people and machines (Howard Grenville 2005, D’Adderio 2008, 2011, Zbaracki and Bergen 2010, Rerup and Feldman 2011, Turner and Rindova 2012). Even stability is an effortful accomplishment that must be enacted and re-enacted (Pentland and Rueter, 1994, Feldman 2000).

Attending to (re)creating and (re)enacting – in other words, *performing* - practices and routines at different times and across different locations provides new ways of exploring transfer. It draws into question the familiar dichotomy of replication and innovation (Aroles and McLean *forthcoming*) that underlies the entity orientation to transfer and highlights the dynamics of enactment that engage diverse arrays of actors and artifacts and the ensuing complementary and conflicting pressures (D’Adderio 2014).

Transfer typically occurs within and/or across organizational sites, boundaries and levels (Kellogg et al. 2006, Jarzabkowski et al. 2015); groups, functions, and teams (Jarzabkowski, et al. 2011); cultures (Bertels et al. *forthcoming*) and kinds of expertise. Such diversity provides fertile ground for actors to use performances in routines to work through differences in complementary and contrasting logics and the related ostensive patterns (D’Adderio and Pollock 2014, Spee et al. *forthcoming*).

A focus on the centrality of performing also draws attention to the diverse array of actors and artifacts, including templates, workflows, models and rules (Orlikowski and Scott, 2008; Leonardi 2011; Robichaud and Cooren, 2013; Dameron et al. 2015) that mediate processes of transfer (D’Adderio 2011). Recent contributions to routine dynamics have, for instance, theorized the artifacts that connect clusters of routines as program

interfaces that inhibit the range of routines that can be transferred (Kremser and Schreyogg *forthcoming*) and as mediators that multiply the options for transferring routines by increasing the opportunities for connecting (Sele and Grand *forthcoming*).

Transfer as performance, finally, often involves entire ecologies of routines that are both coordinated by, and also coordinating of, activity within and across contexts (Birnholtz et al, 2007). The dynamics through which intersections across multiple interdependent routines are enacted (Jarzabkowski et al. *forthcoming*), and different routines and routines aspects are recombined (Deken et al. *forthcoming*, Cohendet and Simon *forthcoming*) create new possibilities for replication and innovation. At the same time, they also create new problems of jurisdiction and therefore potential struggle, particularly where multiple (complementary or contradictory) performances and ostensive patterns are enacted (Salvato and Rerup 2014).

In our quest to explore the recreation and transformation of routines through transfer we encourage new perspectives which draw from current scholarly debates including – but not limited to - Organizational Theory, Practice Theory, Strategy as Practice, Process Theory and Institutional Theory. We invite theoretical and theoretically-informed empirical papers and methodological contributions that advance our understanding of the relationship between routines/practices and their contexts. We are particularly interested in papers based on case studies or empirically grounded theorizing, although we also welcome more conceptual-philosophical treatments, with a possible – although not exclusive – focus on the following topics:

- **Transferring ‘Best’ Practice.** What is the role of formal descriptions of routines (such as standards or “best” practices) and templates (actual examples) in guiding and shaping actions in routines?
- **Innovation, Replication and Transformation** How and how far are practices and routines shaped during transfer? What is the relationality of innovation/adaptation and replication?
- **Diversity and Performative Struggles.** How do practices and routines change as they are (re)created at different sites by different agencies holding different knowledge and objectives and through different artifacts?
- **Multiplicity and Ecologies.** How are ecologies of routines created, transferred and recreated? What is the relationship between multiple ostensive and performative patterns during the transfer of routines?
- **Artifacts and Materiality.** How do artifacts and technologies enable and constrain the (re)production of routines? What is the role of artifacts as intermediaries and mediators in routines transfer?
- **Institutions and Logics.** What are the dynamics through which routines and institutional contexts shape one another? How do routines contribute to (re)creating the institutional contexts to which they are transferred?
- **Recreation and Recombination.** How and how far are routines and routine aspects partitioned and recombined as they are transferred? What are the implications of mixing and matching routines imported from one organizational domain to another?
- **Time and space.** How do routines and practices become instantiated at different points in time and across different locales? How are different spatial or temporal enactments of the routine coordinated?
- **Coordination and Interdependence.** How is coordination of action enabled/ inhibited during the transfer and (re)creation of routines and their patterns? How do interdependent patterns (ostensive and performative, within and across routines) shape the (re)creation of routines?
- **Knowledge and Expertise.** What is the role of experts in the transfer of practices and routines? How does expertise shape routines by both stabilizing and destabilizing knowledge during transfer?

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About the convenors

Luciana D'Adderio (SPRU-Sussex University Ph.D, 2004) is Reader in Management at Strathclyde Business School and 'Innovation Fellow' with the ESRC/EPSRC-funded Advanced Institute of Management (AIM) Research. Her AIM award, titled "Dependable Innovation" (dependableinnovation.org) examined the challenges to Open Innovation in the context of high technology and distributed organisational practices and networks. Luciana's research focuses on the micro dynamics of organisational practices and routines, with an emphasis on the role of agency and materiality on their emergence, evolution and maintenance, codification, transfer and replication. She is best known for her work on routines and artifacts, where she has developed a framework that integrates artifacts and materiality as a core feature of routine dynamics. In a related context, she has conducted research on the organisational aspects of Information Systems development and use including the mutual adaptation of standard procedure and actual practice, and the tensions between flexibility and control. In a different but also related line of work, she has theorized the performativity of models, artifacts and organizational theories (including Replication, Innovation, Modularity and Reliability). Luciana has published articles in high impact academic journals including *Organization Science*, *Organization Studies*, *Accounting, Organization and Society*, *Research Policy*, *Information and Organization*, and *Industrial and Corporate Change*. Her publications include the monograph '*Inside the Virtual Product: How Organizations Create Knowledge through Software*' (Edward Elgar). She is a member of the Organization Science Editorial Board and is currently acting as a Senior Editor for the *Special Issue of Organization Science on 'Routine Dynamics'* (routinedynamics.org).

Martha S. Feldman (Stanford University PhD, 1983) is the Johnson Chair for Civic Governance and Public Management at the University of California, Irvine. Her research on organizational routines, inclusive public management and qualitative methods draws heavily on her ethnographic research and on practice theory. She is best known for her work establishing the field of routine dynamics, which explores the internal dynamics of routines. Martha has been a Senior Editor at *Organization Science* since 2006 and also serves on the editorial boards of the *Academy of Management Journal*, *Academy of Management Discoveries*, *International Public Management Journal*, *Journal of Management Studies*, *Organization Studies*, *Public Administration Review* and *Qualitative Research in Organizations and Management*. In 2009 she received the *Administrative Science Quarterly's* award for Scholarly Contribution. In 2011 she received the Academy of Management Practice Scholarship Award. In 2014 she received an honorary doctorate in economics from St. Gallen University Business School and was listed by Thomson Reuters as a highly cited author. In 2015, she received the Academy of Management Distinguished Scholar Award from the Organization and Management Theory Division and was elected as a Fellow of the Academy of Management. She can be reached at feldmanm@uci.edu.

Paula Jarzabkowski (Warwick University PhD, 2001) is Professor of Strategic Management at Cass Business School, City University London. Paula's research focuses on strategy-as-practice in complex and pluralistic contexts, such as financial markets, and regulated telecommunications and energy markets, as well as third sector organizations. She has held a number of prestigious fellowships that have enabled her to conduct ethnographic research in a range of industries, including an Advanced Institute of Management Ghoshal Fellowship, an Insurance Intellectual Capital Initiative fellowship, and a European Framework Marie Curie Fellowship. She 'enjoys' the challenge of publishing ethnographic work in leading journals, including *Academy of Management Journal*, *Organization Science*, *Strategic Management Journal*, *Journal of Management Studies* and *Organization Studies*. In 2005, she published the first book on strategy-as-practice, *Strategy as Practice: An Activity-Based Approach* (Sage) and her latest book, *Making a Market for Acts of God* was recently published by Oxford University Press. Paula also believes strongly in research relevance, as demonstrated by her award of the 2013 ESRC Outstanding Impact on Business prize.