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**Diagnosing Social Support and Performance Management: A Case Study of Contextual  
Ambidexterity in a Manufacturing Company**

By

**Darren Kerr Allen**

A Dissertation Submitted in Partial Fulfillment of the Requirements for the Degree

Of

Executive Doctorate in Business

In the Robinson College of Business

Of

Georgia State University

GEORGIA STATE UNIVERSITY

ROBINSON COLLEGE OF BUSINESS

2013

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## ACCEPTANCE

This dissertation was prepared under the direction of the Darren Kerr Allen's Dissertation Committee. It has been approved and accepted by all members of that committee, and it has been accepted in partial fulfillment of the requirements for the degree of Executive Doctorate in Business in the J. Mack Robinson College of Business of Georgia State University.

H. Fenwick Huss, Dean

## DISSERTATION COMMITTEE

Dr. Wesley Johnston - Chair

Dr. Lars Mathiassen

Dr. Minna Rollins

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## Abstract

### **Diagnosing Social Support and Performance Management: A Case Study of Contextual Ambidexterity in a Manufacturing Company**

By

**Darren Kerr Allen**

Committee Chair: Dr. Wesley Johnston

Major Academic Unit: Marketing Department

This study diagnoses performance in a mature manufacturing company based on an inquiry into contextual ambidexterity. Previous research has shown that creating a high performance context is founded upon the constructs of performance management and social support; however, this research has been conducted in fast evolving, relatively young companies such as software design firms. To date, no research has shown if a well established manufacturing firm can create a context with high levels of performance management and social support establishing a high performance environment and therefore be contextually ambidextrous. The presented contextual ambidexterity inquiry considers social support based upon four specific types of support, namely emotional, appraisal, informational, and instrumental support. Within social support, the concepts of trust and burnout are also vital in establishing the proper culture to achieve high performance. Further, performance management is founded upon human capital management established in a suitable corporate culture. In this study, this approach to a contextual ambidexterity inquiry is applied within the context of a U.S. based division of a global manufacturing company based on a survey, participant observation, and individual interviews. The research contributes to both the academic and practitioner environments with a greater

understanding of the antecedents of high performance in an environment outside that of a young, fast evolving software firms. Further, it is shown that a high performance context may exist within organizations that are vastly different from those previously studied. In addition, this study offers an approach to a contextual ambidexterity inquiry with refined definitions and measures based on established constructs as well as new constructs. The implications of these additions to our understanding of contextual ambidexterity to both academia and practice are discussed and several avenues of future research are proposed.

## **1.0 Introduction and Problem Statement**

As previous research has succinctly shown (Gibson and Birkinshaw 2004), organizations that are successful in changing market environments are ambidextrous. Ambidexterity, in a very general sense, encompasses the ability to do two different things equally well. For an organization it is defined as the capability of being aligned and efficient in the addressing current business situations, while also adaptive enough to adjust for developments in their environments that will allow them to thrive in the future business situations (Duncan 1976, Tushman 1996). The overriding concept that engenders the importance of ambidexterity is that the stress on an organization in its market environment is in perpetual conflict, so there are constant exchanges that must occur.

In contrast, the concept of contextual ambidexterity has been similarly developed (Gibson and Birkinshaw 2004); it is deemed to be *contextual* because it develops from the characteristics, specifically the processes and systems, of the specific organizational context. Gibson and Birkinshaw (2004) defined contextual ambidexterity as “the behavioral capacity to simultaneously demonstrate alignment and adaptability across an entire business unit”. They

went on to define alignment as the “coherence among all the patterns of activities in the business unit; they are working together toward the same goals”. Further, they stated that “adaptability refers to the capacity to reconfigure activities in the business unit quickly to meet changing demands in the task environment”. Almost by definition, these concepts are complicated to manage, inefficient to create, and causally indefinite (Amit and Schoemaker 1983, Prahalad 1990, Barney 1991, Gibson and Birkinshaw 2004). In essence, structural ambidexterity focuses on the organization as the unit of analysis, while contextual ambidexterity has been defined as focusing on the individual within the organization as the unit of analysis. While the anticipated advantages of contextual ambidexterity are significant, realizing ambidexterity in a complex business environment is by no means uncomplicated. Each contradictory capability requires dissimilar and often incongruent systems, environments, processes, and beliefs, thereby creating conflicts and dilemmas that demand to be resolved (Tushman 1996, Floyd and Lane 2000, Gibson and Birkinshaw 2004).

Currently, no research has been conducted on the antecedents to the high performance context that leads to contextual ambidexterity within the context of a mature manufacturing company; this is regarded as a considerable inadequacy in the literature, especially in light of the strategic role that flexibility to adjust to changing market conditions plays in the overall health of an organization. Similar research has been conducted in other industries, specifically in the area of information systems, where it was found that successful teams were ambidextrous, using coping strategies that exhibited both flexibility and rigor. In these situations, it was found that increasing both performance management and social support led to great contextual ambidexterity (Lee, DeLone et al. 2006). In a similar sense, by conducting a single case research study, it will be

possible to explore the antecedents of contextual ambidexterity within the identified environment.

Therefore, the intent of this research is an in-depth study of the antecedents of the high performance context that leads to contextual ambidexterity within the context of a single mature manufacturing company. A U.S. based mature manufacturing company agreed to allow the researcher to conduct an in-depth analysis of their current state of performance and to explore the antecedents that are contributing to such.

This research will build on the organization-context literature, in particular Ghoshal and Bartlett's (1994) framework for organizational effectiveness, as well as, Gibson and Birkinshaw's (2004) argument for contextual ambidexterity to develop an approach to contextual ambidexterity inquiries in mature manufacturing companies. In doing so, this research will define and build upon the concepts of performance management, social support, trust, and burnout culture. Specifically, this study asks the question: *What are the antecedents of a high performance context that leads to contextual ambidexterity within a mature manufacturing company?* An answer to this question can be found in the Findings chapter. Accordingly, this research examines the dualities as well as the antecedents of ambidexterity. Hence, the following research objectives are investigated within a mature manufacturing company:

1. Identify the dualities involved in social support and performance management, as well as the contributing effects of burnout and trust.
2. Explore the levels, effects, and hindrances to performance management, social support, burnout, and trust.

To meet these research objectives, a research project was initiated with a manufacturing company who desires to remain anonymous; therefore, for the purposes of this study, it will be

referred to as ManufacturingCo. This company is a mid-sized U.S. based manufacturer of food products; the specifics of the case will be addressed in a subsequent section. Organizations such as this represent an excellent environment for studying dualities involved in achieving contextual ambidexterity, especially when utilizing a case based research approach.

The paper proceeds as follows: first, a background of the specific case regarding the target company will be described. Next, the literature on contextual ambidexterity, social support, performance management, burnout, and organizational trust will be reviewed in a format that integrates all of the concepts into the research. Then, the conceptual model will be presented demonstrating the relationships between the concepts explored in the literature review. This is followed by a method section that describes the single case study methodology in general, the criteria by which it should be evaluated, and the details for this specific research project.

Following that, the findings of the study, specifically the antecedents to a high performance context that leads to contextual ambidexterity and the related approach to the contextual ambidexterity inquiry, will be discussed. Next, the contributions of this research to the literature as well as to practitioners will be explored. Finally, both the limitation and implications of the research will be presented.

This study employs a case framework that allows it to accomplish the outlined objectives. Specifically, it utilizes an overall style that is a practical, inductive, field study consisting of a single case explored in great depth. By adhering to a single case study methodology, a high level of immersion into the context and environment of the target organization was possible and as such, permitted a full understanding of the influences on the phenomenon of interest. However, it is also recognized that in spite of its strengths, a single case study methodology is not without its limits, both of which will be explored later in the methodology section. The single case study

research method, with its in-depth contextual exploration, is exceptionally appropriate for this study (Yin 2009).

As previously mentioned, this study is situated in a manufacturing environment. Within the context of contextual ambidexterity, a reoccurring theme is the interplay between the organization's strategy and its market; the manufacturing environment is no different. A significant portion of the extant research focuses on manufacturing adaptability as a vital element of an organization's response to environmental uncertainty (Upton 1994, Upton 1995, Upton 1995, Upton 1997). Within adaptability, which some literature streams refer to as flexibility, initiatives differ greatly, depending on how organizations interpret, inspect, and learn from their environments (Daft and Weick 1984, de Treville, Bendahan et al. 2007). Researchers have highlighted the need for increased study of the operational practices and learning processes related to manufacturing adaptability that could clarify how some firms respond to the environment more successfully than others (Sawhney 2006, Patel 2011). However, especially within the context of manufacturing companies, very little research has been published concerning ambidexterity and what has been published focuses exclusively on structural ambidexterity. The overriding purpose of this study is to show that contextual ambidexterity is applicable to a mature manufacturing organization and then to determine the antecedents to that ambidexterity.

## **2.0 Literature Review**

In order to study the antecedents to a high performance context that leads to contextual ambidexterity, it is first necessary to define the key components, namely contextual ambidexterity, social support, performance management, burnout, and organizational trust.



Until Birkinshaw and Gibson's (2004) seminal work, ambidexterity was typically viewed as being related to the structure of the organization. It was Duncan (1976), who first utilized the term, arguing that organizations must navigate the tension between alignment and adaptability, and do so by creating "dual structures". These dual structures were typically accomplished through different business units within the same organization. Usually one business unit focused on alignment while another focused on adaptability. Such an organizational configuration has become known as structural ambidexterity.

Birkinshaw and Gibson (2004) took a different approach and recognized the role of the processes and systems present in a given context in achieving the desired balance between opposing demands. In other words, dual organizational structures are not necessary, but instead a context that allows individual employees to possess the traits necessary to navigate the tension between alignment and adaptability is required. Through their arguments, they created the concept of contextual ambidexterity and defined it as the "behavioral capacity to simultaneously demonstrate alignment and adaptability across an entire business unit." It is this concept that is the focus of this study.

## **2.1 Contextual Ambidexterity**

In organizational literature, ambidexterity refers generally to an organization's ability to pursue two different objectives simultaneously; examples abound, such as differentiation and low-cost strategic positioning (Porter 1980, Porter 1996), manufacturing efficiency and flexibility (Carlsson 1989, Adler, Goldoftas et al. 1999), or global integration and local responsiveness (Bartlett and Ghoshal 1989). However, the literature has traditionally approached ambidexterity as that of an organization's structure (Gibson and Birkinshaw 2004). It was Duncan (1976) who first used the term, and developed the concept of organizations managing the conflict inherent in

ambidexterity by creating “dual structures,” so that certain departments within businesses, or smaller groups within departments, concentrate on alignment, while others concentrate on adaptation; this concept is formally referred to as structural ambidexterity (Gibson and Birkinshaw 2004).

Overall, the ambidextrous organization accomplishes alignment in its current operations while also adapting effectively to changing market demands. Tushman and O’Reilly (1996) specified ambidexterity as the “ability to simultaneously pursue both incremental and discontinuous innovation and change”; and March and Simon (1958) discussed the balance between the conflicting demands for exploitation and exploration. On the other side of the equation, there has been discussion as to whether these organizational tensions, such as those between alignment and adaptability, can be effectively resolved (Ford and Ford 1994, Lewis 2000). Also, embedded in the extant research on manufacturing, the trade-off between efficiency and flexibility has been viewed as integral to the manufacturing process (Hart 1942, Klein 1984, Carlsson 1989, Ghemawat and Costa 1993). Supporters of this argument have suggested that tradeoffs are best managed through structural separation, such as creating autonomous business units (Tushman 1996), as an example. Structural separation, such as this, ensures that each organizational unit is organized towards the specific needs of its environment (Burns and Stalker 1961, Lawrence 1967), but such structure is not without costs.

Recently, and more frequently, organizational literature has recognized the significance of concurrently balancing these seemingly contradictory tensions, and thus have begun to shift their focus from trade-off (either/or) to paradoxical (both/and) approaches that organizations may employ (Koot, Sabelis et al. 1996, Gresov and Drazin 1997, Bouchikhi 1998, Morgeson and Hofmann 1999, Lewis 2000, Early and Gibson 2002). Further, the literature is increasingly

focused on the impact the processes and systems present in a given environment have on achieving the requisite balance between the conflicting demands (Gibson and Birkinshaw 2004). These processes and systems are significant since they are the foundation for the structures that are intended to create an environment that balances the conflicting demands of ambidexterity (Brown and Eisenhardt 1998, Marks 2001).

As previously mentioned, ambidexterity has been defined as the ability to pursue simultaneously contradictory capabilities concurrently such as exploration-exploitation (Tushman 1996), flexibility-efficiency (Adler, Goldoftas et al. 1999), alignment-adaptability (Gibson and Birkinshaw 2004), and flexibility-rigor (Lee, DeLone et al. 2006). Ambidextrous organizations succeed in the marketplace by simultaneously increasing efficiency, decreasing cost, and implementing evolutionary innovation (exploitation), while at the same time increasing flexibility, speed to market, and revolutionary innovation (exploration)(Tushman 1996). As an example, a company must choose to invest its limited capital in making current production processes more efficient (exploitation) or developing new products to take to market (exploration). It is understood that while the conflicts can never be entirely eliminated, successful organization do manage to balance the two competing interests, and in doing so make possible their long-term market viability.

Traditional organizational research in manufacturing organizations has focused on achieving structural ambidexterity, with no mention made of contextual ambidexterity. This is somewhat expected since manufacturing companies are traditionally thought of as being highly structured due to the inherent need to organize around highly fixed equipment and processes. Further, such organizations make significant capital investments, that once made are difficult to reposition in a flexible context. Therefore, creating the correct structure is generally viewed as being necessary

to achieve ambidexterity. In addition, such organizations tend to have highly rigid structures due to the nature of their work environment. Therefore, researchers have primarily adopted the theory of structural ambidexterity in designing ambidextrous solutions for such businesses. The theory of structural ambidexterity was therefore the expected first step in evolutionary process for such organizations; contextual ambidexterity is the natural next step. However, organizational researchers have only briefly touched on contextual ambidexterity within manufacturing firms. This factor demonstrates the need for the literature to increase its appreciation for the dualities of flexibility and rigor associated with ambidextrous manufacturing organizations and to broaden its understanding of the ways in which achieving ambidexterity can be accomplished.

In addition, it has been argued in the literature is the idea that organizations can create structures to reconcile these conflicts. In a very broad sense, within structural ambidexterity, managers create separate business units within the organization which specialize in one required capability, and the top management team assumes the responsibility for coordinating contributions of the two units to achieve ambidexterity at the organizational level (Gibson and Birkinshaw 2004). Ambidexterity is a constant theme in organizational literature (Raisch 2008); however, the significance of ambidexterity is only recently recognized in the supply chain and operations management literatures (Adler, Benner et al. 2009, Kristal, Huang et al. 2010). Organizations with ambidextrous capabilities are more capable to balance competing tasks and interact with diverse knowledge sets (Mom 2009), and realize high performance manufacturing flexibility capabilities. In the manufacturing environment, as an example, flexibility and cost-efficiency are no longer perceived as contradictory (De Meyer, Nakane et al. 1989, MacDuffie 1995). Patel, et al. (Patel 2011), argued that ambidexterity “can enhance manufacturing responses, improve

quality, reduce costs, and contribute to positive firm performance outcomes”. In addition, ambidextrous firms were able to explore new technologies while improving existing technologies; when operating in an environment characterized by high uncertainty, ambidexterity can improve a firm’s ability to respond efficiently and effectively with flexible manufacturing processes, leading to better performance. However, it is recognized that to achieve both may involve the separation of tasks within a single business unit, where, for example, one group adopts an “organic” structure while another takes on a “mechanistic” structure (McDonough 1983, Hedlund and Ridderstrale 1997, Adler, Goldoftas et al. 1999). It has also been suggested in the literature that an organization should structure itself around the concept of temporal separation, where an entire unit focuses on one set of tasks one day, then on a different set of tasks the next (Duncan 1976, McDonough 1983, Adler, Goldoftas et al. 1999). These approaches permit the competing demands of adaptability and alignment to be met within a single business unit, but still rely on organizational architecture and management to decide how to meet those different needs. Thus, academics have paid more attention on structural ambidexterity, developing structural mechanisms to cope with the competing demands faced by the organization for alignment and adaptability.

Gibson and Birkinshaw (2004) took the concept further and developed what has become known as contextual ambidexterity. In their argument, they maintained the concept that ambidexterity is an organization’s ability to concurrently achieve alignment and adaptability within a single business unit, but went on to suggest that it is achieved not through structural, task, or temporal separation, but by building a business unit framework, in essence a context or environment, that incentivizes individuals to make their own judgments as to how best separate their time and efforts between the conflicting demands for alignment and adaptability. In addition, contextual

ambidexterity is a concept that pervades all functions and hierarchies in a unit, instead of a “dual structure” (Duncan 1976) in which the two demands are kept separate. Within contextual ambidexterity, the accountability for achieving ambidexterity is shared by members within the organization. To create a high performing business unit, the top management team is advised to create an organizational context which facilitates both alignment and adaptability through appropriate performance management and social support (Gibson and Birkinshaw 2004). Essentially, every member of an organization can perform within his or her own functional area, while simultaneously perceiving changes in the task environment, and acting accordingly. Gibson and Birkinshaw (2004) argue that this is perhaps a more sustainable model than structural separation since it facilitates the adaptation of an entire business unit.

The theory of contextual ambidexterity differs dramatically from the older theory of structural ambidexterity in that the former is best accomplished not through the establishment of dual structures, but by assembling a set of processes, procedures, environments, cultures, or systems that permit and support individuals within the organization to rely on their own reasoning about how to divide their efforts between alignment and adaptability.

Gibson and Birkinshaw (2004) also identify that while contextual ambidexterity is a characteristic of an organization as a whole, it presents itself in the specific actions of individuals throughout the organization. They present the example of an employee who must, on a daily basis, face a choice as to how they should spend their time—should they continue to focus on an existing customer account to meet quota, or should they nurture a new customer who has a slightly different need than what the company has historically provided? In organizations that are either aligned or adaptive, individuals are given clear instructions and receive incentives only for those activities that support either alignment or adaptation, but rarely both. However, in a

contextually ambidextrous organization, the context is dynamic and adaptable enough to allow individuals to utilize their perception as how to divide their time between alignment-oriented and adaptation-oriented activities, and both are incentivized.

Adler, et al., (1999) referred to two mechanisms for reconciling the tension between efficiency and flexibility that rely on individual employees to make their own choices: (1) meta-routines for systematizing the creative process and (2) job enrichment schemes that enable workers to become more innovative and flexible. Adler, et al., along with Gibson, pointed to the need for a behavioral orientation toward dual capacities, rather than a higher-level separation of those capacities. They both also stated that organizations must build systems and processes that reward and motivate these behaviors within individuals.

Key characteristics of such firms have been shown include a dependence on multiple projects servicing known customers and manufacturing processes, overburdened employees performing multiple roles, and a tendency to rely on a hierarchical decision making process over the empowerment of employee judgment (Horvat, Rozman et al. 2000). Furthermore, the culture in these companies tends to frustrate staff and lends itself to the creation of a burnout climate. To be successful, especially in today's fluid marketplace, these organizations must become agile and adapt quickly to environmental changes and frequent customer requests (Ramesh, Pries-Heje et al. 2002, Mathiassen and Vainio 2007). Concurrently, such organizations can gain a competitive advantage from increasing adaptability and alignment across all employees. Therefore, the leadership of mature manufacturing organizations must be capable of effectively balancing adaptability and agility while making modifications for the specific context in which they operate (Boehm and Turner 2004). If these managers do not currently possess the skills to create this balance, then they must be taught such skills. In addition, the overall environment must be

adjusted so that the factors that precede contextual ambidexterity are present, such as social support, performance management, and trust.

Given the existent literature, the researcher defines contextual ambidexterity as an interaction of organization traits of both alignment and adaptability; traits that concurrently pervade throughout the organization. These organization traits allow a culture that promotes the ability of an individual within the organization to be both aligned and adaptable.

## **2.2 Social Support**

Gibson and Birkinshaw (2004) identified social support as being a necessary antecedent to increasing the contextual ambidexterity within an organization. House (1981) identified four separate types of social support: emotional, appraisal, informational, and instrumental support; these types of support may be demonstrated in several ways. For instance, emotional support may be care giving or affective concern; appraisal support may be evaluative feedback or affirmation; informational support may present as directives or suggestions; and instrumental support may be in the form of environmental modification or aid in kind (House 1981). As they relate to the organization, these types of social support may have direct effects such as reducing the stressors which the individual faces or reducing the effects of symptoms which the individual may experience. The forms of social support may also have a buffering effect by moderating the relationship between stressors and health-related outcomes (Payne 1987).

House (1981), however, did not discuss the mechanisms where social support relationships develop or fail to develop in the case of an individual. A potential explanation of the mechanism comes from Bowlby (1973, 1982) who formulated a theory of attachment behavior. According to the theory, the principal function of attachment behavior is defense from predators. This



observation is supported by three main facts from research with several species of mammals, birds, and human infants (Bowlby 1982). First, the solitary member is more likely to be attacked by predators than a member attached to a group. Second, those who are most vulnerable because of size, age, or condition, such as young offspring, more readily exhibit attachment behavior. Third, attachment behavior is more often displayed in high intensity in stressful or alarm situations, such as when a predator is nearby. Expanding the theory, Bowlby argues that those who form healthy attachments to other members of the group are more secure and self-reliant than those who do not.

Quick, Nelson, and Quick (1987, 1990) have expanded on Bowlby's theory by studying the behavior of corporate executives. At a psychological level, they argue, these executives form attachments which provide them with essential social support functions during stressful situations. Bowlby (1982) argues that a self-reliant person seems very independent due to the variety of supportive attachments the individual has created. When the ability to form healthy attachments is restricted, the individual becomes susceptible to a variety of environmental risks due to their isolation. Therefore, attachment theory forms the underlying theory for explaining the process whereby an individual uses the available social supports structures to forestall distress. Consequently, a portion of the direct, stressor-reduction effect of social support may also be understood theoretically through attachment theory. Vaillant's (1977) research study involving the men of the Harvard class of 1942 over a 35-year post graduation span shows that those who successfully adapted to their post-graduate lives, as opposed to those who were unsuccessful from a mental health perspective, used what were determined to be highly developed defense mechanisms, such as sublimation and humor. These mechanisms were developed over many years and often were developed from modeling parental behavior.

Therefore, it was theorized that psychological attachments and social support afforded a basis for modeling behavior and provide information about managing stressors in life, thus reducing the impact of the stressors. Therefore, while the early life attachments afford defense for the individual, they also educate the individual about the need for social support later in life.

Many research studies have examined the influence of social support on various adjustment indicators in both work and non-work environments. In a study of over 2,000 bank employees, Beehr and Drexler (1986) found social support to have a direct effect upon job satisfaction and job search intent, while also having a moderating effect between role stress and these two outcomes. In addition to effects on satisfaction, the connections between social support, commitment, and employee turnover have been studied among nurses. Fisher's (1985) longitudinal study demonstrated main effects of social support from peers and supervisors taking the form of increased satisfaction and commitment and decreased turnover and stress. However, Kaufmann and Beehr's (1986) showed stressors to be related to strains when subjects reported high social support. These authors theorized several explanations for this counterintuitive finding, which conflicts directly with Fisher's (1985) results. Kaufmann and Beehr (1986) suggested that nurses experiencing high levels of stress seek out more social support than those experiencing less stress, but did not investigate the temporal relationship between the stressor and social support.

Seers, McGee, Serey, and Graen (1993) researched the effects of social support from four sources in a banking environment on several facets of job satisfaction. Their results indicated a direct effect of unit manager (immediate supervisor) support on satisfaction with supervision within the banking branch. Also, co-worker support was related to satisfaction with work and satisfaction with supervision. The different patterns of relationships which emerged indicated the

need to specify sources of support in conducting this type of research and also begin to point towards the difference between managerial support and organizational support. Their research also begins to point towards the moderating effect that the differences between managers and leaders can have on the evaluation of social support.

Ford (1985) took a different approach and found that emotional support, contrasted with informational and structural support, had positive effects on the reduction of job stress, an increase in job satisfaction, and a decrease in role stress in a sample of employees of a sales and manufacturing firm. Ganter, Fusilier and Mayes (1986) studied employees of a contracting business regarding the support from their supervisors, co-workers, families, and friends. Supervisory support was strongly related to workplace strain, while support from co-workers was moderately related to workplace strain. This proves similar to the findings of Kaufmann and Beehr and fails to take into account the temporal relationship between support and stress.

Alignment between employee expectations and the organizational culture will better enable the firm to obtain sustainable health and growth. Dessler (1994) argues for increased skill training and personnel development programs that are set up with consideration for alignment with business mission, should improve the efficacy of such programs and, therefore, their business impact. In addition, employee communication and participation programs, especially in companies with a strong sense of purpose. Further, incentive programs that are intended to incentivize long-term business interest among employees should enhance the positive outcomes of such programs.

Overall, there are conflicting findings within the literature concerning the beneficial effects of social support on satisfaction, anxiety, depression, commitments, turnover, and stress. Further,

social support within the organization is characterized by personnel development, access to the proper information to make informed decisions, the replication of best practices, treating failure as a learning opportunity, the establishment of incentives to promote a long-term commitment to the organization, an establishment of trust from the employees towards the firm, the proper onboarding of new employees, and the willingness and ability of employees to take prudent risks. While some studies provide evidence for the benefits of social support in achieving satisfaction and adjustment at work, other studies have found high levels of support among strained employees. However, much of the conflict can be resolved once the temporal relationship between the social support and the job stressors are understood. In addition, it is necessary to understand what factors of social support aid in increasing worker performance and therefore the ability to achieve contextually ambidexterity.

### **2.3 Performance Management**

Contextual ambidexterity is directly linked to an organization's ability to maintain sustainable performance. Employees performing alignment activities directly or indirectly focused on improving performance in the short term, while those engaged in adaptability activities are focused on improving performance in the long term. Thus, if an organization focuses on one of these at the expense of the other, conflicts will necessarily occur. Argyris (1993) argued that these conflicts originate from the construction of ambiguous messages that divide the organization at the firm level. Lewis (2000) went further to state that restraining one side of the issue within a given business unit intensifies pressure from the other. Therefore, employees necessarily work to decrease the frustrations and discomfort that arise from the tensions. Hofstadter (1979) argued that the employees' defensive behaviors initially produce positive

effects, but eventually foster opposite, unintended consequences that increase the pervading tension, creating what he referred to as a “strange loop”.

Chan, et al. (2004), argued that organizational culture and High Performance Human Resource (HPHR) practices are potential resources that serve the need for dynamic capabilities. They point out that while human capital is vital, the primary driver for sustainable performance is a combination of human capital management and a suitable organization culture. Moreover, when combined, these two competencies give firms the desired renewable capabilities to invest, reallocate, rejuvenate, and upgrade their resources. As expected, it takes time and resources to develop such capabilities, which may explain the inability of organizations to realize sustained competitive advantage by businesses focusing primarily on short-term profits.

Barney (1997) considers each of these two capabilities to be a resource in terms of value, rareness, and inability for firms to imitate. Overall, researchers conclude that a supportive organizational culture is necessary for human resource practices to result in strategic advantage creating capabilities. This support can be manifested through routines, managerial values, rituals, and organizational culture which then directly and indirectly influence resource allocation decisions (Merron 1995, Deal and Kennedy 2000). Chan Shaffer, et al. (2004) then argued that without the support of a necessary culture, HPHR practices will not function to their fullest performance potential.

Hamel and Prahalad (1994) state that an organization with a culture that maintains clear direction for employees to develop their skills and learn new innovations, guidance for assignment of firm resources, a desire for creativity, harbors positive inclinations toward changes, and commitment to incorporate a flexible business environment (Kotter and Heskett 1992, Denison and Mishra

1995) will perform better over the long term. Similarly, Sheridan (1992) states that a culture that enhances a firm's ability to retain a well-developed and inspired employee base is equally important in sustained performance. In addition, Powell (1995) emphasized the need for a culture to concentrate on more than just the defined business practices, hinting at the ability to be both aligned and adaptive. Chan, et al. (2004) continued by stating, "The dynamic nature of these co-specialized resources is also evident in the ability of HPHR practices to reinforce the effect of the necessary culture." As Huselid (1995) argued, high performance practices such as these serve to increase employees' skills, knowledge, and abilities which then provide an instrument by which employees can use those traits in performing their specific roles. By utilizing these organizational characteristics, firms develop employees' competencies as well demonstrating their commitment towards their employees (Campbell and Tawadey 1990, Dessler 1993). Thus, the relationship between organizational culture and HPHR practices is a positive self-reinforcing cycle that sustains, and even increases, a firm's competitive advantage.

Chan, et al. (2004) maintain that each of the four primary organizational cultural traits, specifically involvement, consistency, adaptability and mission, interacts with the others to influence overall firm performance. Additionally, Dessler (1994) argued that an organizational culture that encourages employee involvement necessarily complements an organization's efforts to promote Human Resources practices of bilateral communication with employees. In addition, performance appraisals that are supported by a culture that encourages individual involvement enhance employee organizational commitment and therefore increase the likelihood of creating a context that fosters contextual ambidexterity. Dessler (1994) maintains that performance appraisals that are openly discussed between managers and subordinates will create a sense of ownership in both parties and also enhance subordinates' performance.

Huselid (1995) maintains that high-performance work practices need to be maintained over an extended period of time with a sensible degree of consistency before they are embedded enough to affect business results. He goes on to state that the firm must maintain consistent practices of employee communication and involvement, skill development, and internal career opportunity, before the employer and employee can benefit from an environment that is conducive to sustainable high performance. According to Dessler (1994) it is this consistency is often proves to be the crucial foundation of appraisal systems. When effectively implemented, therefore, performance reviews positively support relationship between the supervisors and subordinates and consequently further the organization's commitment to performance management.

Denison and Mishra (1995) argued that firms that are adaptable are also responsive to varying environmental situations and adjust internally to maximize benefits from environmental changes. These firms need to detect environmental signals quickly and accurately and then translate the signals effectively into organizational modifications to best exploit opportunities and reduce the negative effect of threats. As such, performance management practices that emphasize company practice sharing, participative management, and formal grievance procedures will aid in the facilitation and lead to the necessary change initiatives (French and Bell 1990, Robbins 1998). Although appraisal systems have to be applied consistently to achieve high levels of business performance, the context of appraisals needs to be adapted to the fluctuating business environment. Conversely, appraisal systems that dictate inflexible performance expectations can morph into a barrier preventing the alignment of expectations and delivery of performance. Therefore, if performance management systems are perceived as flexible and fair, they will result in better-motivated employees and also business outcomes aligned with changing market conditions.

Arthur (1994), as well as Schuler and Jackson (1987) argue that the traditional performance management system is characterized by practices of negligible employee training, little employee development, rigidly written job descriptions, highly structured jobs, and is therefore short-term results oriented. Chan, et al. (2004), argue that a performance management system built upon the principals of commitment to the organization will better match the competitive needs of firms employing a differentiation strategy. Commitment performance management systems regularly are exemplified in terms of increased employee involvement and involvement, instruction in group problem solving, and socializing activities (Arthur 1994).

Therefore, in order to increase the likelihood of a high performance of an organization, and therefore the likelihood of achieving contextual ambidexterity, it is important for the organization to have a properly developed performance management system that emphasizes firm commitment and flexibility within the organization. Such performance management systems would naturally present through frequent and constructive employee performance feedback, the use of incentives to modify employee behavior, an environment where employees are held accountable for their performance, and the use of creative challenges to both allow the organization to address fluid marketplace challenges and allow employees to expand their specific skill set.

## **2.4 Burnout**

According to Maslach and Jackson (1986), burnout is a work-related stress disorder that was initially observed in employees who do "people work". More recent research has shown that the core dimensions of burnout, namely exhaustion, cynicism, or disengagement from work, is present in virtually every occupational group (Leiter and Schaufeli 1996, Demerouti, Bakker et



al. 2001, Bakker, Demerouti et al. 2003). Demerouti and Baker (2003) defined exhaustion as an extreme form of fatigue as a consequence of intense and prolonged physical, affective, or cognitive stress caused by protracted exposure to specific working conditions or stressors. Freudenberger (1974) defined disengagement as the intentional distancing of the employee from his or her work, work objects, or work content. It is perceived as a reaction presenting as an emotional, cognitive, and behavioral rejection of the job and it can be perceived as occupational disillusionment. Maslach and Jackson (1986) present an additional component of burnout, namely reduced personal accomplishment. However, it has been found that personal accomplishment has weak relationships with the two other components of burnout (Lee and Ashforth 1996). This finding supports the idea that emotional exhaustion and disengagement form a condition that is only loosely related to personal accomplishment (Schaufeli, Bakker et al. 2001). In addition, Leiter (1993) argued that emotional exhaustion is a precursor to cynicism and disengagement, and therefore present the question of a temporal relationship between the two constructs. However, Leiter also found that feelings of reduced personal accomplishment develop independently.

The Maslach Burnout Inventory (MBI) (Maslach 1996) is the most often used instrument to assess burnout, and pertinent portions were utilized in the survey instrument of this study. In addition, the survey instrument also utilizes the Oldenburg Burnout Inventory (OLBI) (Demerouti, Bakker et al. 2001, Demerouti, Bakker et al. 2003), since this instrument incorporates burnout as a disorder stemming from work-related negative experiences, and incorporates feelings of exhaustion and disengagement from work. The specifics of these two inventories will be explored in further detail in a later section.

Motowidlo and Van Scotter (1994) argued that employees normally engage in two types of performances; specifically, they perform in-role and extra-role activities. Motowidlo and Van Scotter (1994) defined in-role performance as the formally required outcomes and behaviors that precisely serve the goals of the organization. Behrman and Perrault (1984) defined in-role performance as the behaviors that include meeting organizational objectives and effective functioning. Morrison (1994) and Podsakoff and Mackenzie (1994) defined extra-role activities as the non-required behaviors on the part of an employee that are believed to directly promote the effective functioning of an organization, without necessarily directly influencing a person's target productivity; the parallel between this definition and the requirement of alignment and adaptability inherent to contextual ambidexterity is obvious. Extra-role activities normally present in several manners including the willingness to help colleagues who have heavy workloads or the avoidance of problems with colleagues (Organ and Paine 1999).

Bakker, et al. (2004), examined how burnout contributes to explaining the variance between in-role and extra-role job performance. Their primary argument was that the demands and resources that exist within employees' working environments affect both in-role and extra-role performance. Their findings were consistent with Bakker, Demerouti, De Boer et al.'s (2003) study, who argued that job demands were strong predictors of exhaustion, and indirectly of extended absenteeism after a one-year follow-up. These findings are vital to the understanding of burnout since when employment demands are high, specifically workload, emotional demands, and work-home conflicts are increased, employees will find it more difficult to allocate their attention and energy efficiently. This is due to having to engage in greater stressful activities and this, in turn, negatively impacts their performance. In addition, Wright and Bonett (1997) found that, within the dimensions of burnout, only exhaustion was negatively related to

in-role performance. Their longitudinal study found no significant relationship between depersonalization, a form of disengagement, and performance as rated by supervisors.

Additionally, Bakker, et al. (2004), found that the two burnout dimensions were strongly related to (in-role or extra-role) performance while perceptions of work characteristics were unrelated to it. They also found that extra-role performance is related to the availability of resources within the organization, specifically when social support, autonomy, and professional development possibilities are high. In exchange for the availability of these resources, employees prove to be willing to go beyond their personal roles (in-role) and engage in activities that benefit the organization as a whole (extra-role).

Similar to Bakker, Munene (1995) found that job involvement was positively related to organizational citizenship behavior. In addition, Wright and Cropanzano (1998) found that high demands in an employee's job generate decrements in primary task performance, because such demands diminish the employee's ability to perform well. This has practical implications as well, in that if management is capable of reducing the demands, for instance, by means of providing employees a better focus or by requiring managed workloads, burnout should decrease and, therefore, employees' performance should increase. It is expected that the current state of the organization of interest is that of burnout, so the extant literature on the subject will be necessary in understanding the antecedents to this current state.

## **2.5 Organizational Trust**

Trust as a phenomenon is difficult to define in a concrete manner. Similar to organizational identity, trust can be examined at different levels such as the collective commitment and co-

operation in order to achieve organizational goals. When examined on an individual level, trust affects to willingness to co-operate and to commit to organizational changes.

Birkinshaw and Gibson (2004) succinctly demonstrate that trust is an antecedent to social support and is therefore required to create a high performance context. Specifically, they define trust as:

an attribute of context that induces members to rely on the commitments of each other. Fairness and equity in a business unit's decision processes, involvement of individuals in decisions and activities affecting them, and staffing positions with people who possess and are seen to possess required capabilities contribute to the establishment of trust.

Atkinson and Butcher (2003) described trust as the “social glue” that can hold various forms of organizational structures together and as such it is a fundamental element in constructive relationships. Mishra and Morrissey (1990) argue that it creates togetherness and gives people a feeling of security, while Shamir & Lapidot (2003) suggest that trust is both an interpersonal and also a collective phenomenon. Atkinson and Butcher (2003) claim that trust is expressed at three levels within an organization: the individual, group, and system levels. At the individual level, trust is based on interpersonal interaction (Atkinson 2003) where trust can be defined as:

“The willingness of a party to be vulnerable to the actions of another party, based on the expectation, that the other will perform a particular action important to the trustor, irrespective of the ability to monitor or control that other party.

The willingness of the employee to be vulnerable indicates that there is something of importance that may be lost in assuming such a position (Mayer 1995). In addition, different definitions and

models of trust focus on the features of trust such as vulnerability, competence, openness, integrity, reliability, and positive expectations (Bhattacharya, Devinney et al. 1998, Jones and George 1998, Rousseau 1998, Kramer 1999, Appelbaum, Bartolomucci et al. 2004, Huemer, Becerra et al. 2004). These qualities refer to trust as a positive anticipation, which another person will not, through words, actions, or decisions, act opportunistically and in a manner that is detrimental to the person who extends trust. For this study, this individual type of trust is synonymous to managerial trust where an employee trusts their direct supervisor not to act in a manner that is detrimental to supervised employee.

Shamir and Lapidot (2003) describe trust as a collective phenomenon when examined at the group level, with teams representing collective values and identities. According to Kramer (1999), the judgment that an individual utilizes concerning others' trustworthiness is rooted, in part, on their priori experiences about the others' behavior. Further, since values are frequently believed to direct behavior, the sharing of common values aids team members in predicting each other's and the leaders' future behavior. In addition, the sharing of values and goals not only reduces group uncertainty, but also helps to determine the types of behaviors, situations, or people that are deemed to be desirable or undesirable (Jones and George 1998, Gillespie and Mann 2004). According to Kramer (1999), teams inherently have trust that is based on rules, which are both formal and informal, and include the information that team members have about tacit understandings. This rules based trust is principally seen through the shared understandings relating to the system of rules regarding appropriate behavior. Kramer (1999) also argues that by institutionalizing trust through practices at the collective level, trust becomes internalized at the individual level.

Atkinson and Butcher (2003) define system level trust as being institutional and based on roles, systems or reputation, from which conclusions are drawn about the trustworthiness of an individual. This trust can be seen as given, based on the organizational role that an individual acts within. Therefore, trust is linked with formal structures, and dependent on individual or firm-specific attributes, such as professional certifications as is seen with accountants, engineers, or doctors (Creed and Miles 1996, Ilmonen 2002, Atkinson and D. 2003).

Tan, et al. (2000), defines organizational trust as the global evaluation of an organization's trustworthiness as perceived by the employee. As such, employees are continually observing the organizational environment when making the decision whether or not to trust their organization. Organizational processes and activities communicate the organization's views of its employees and their respective roles, and employees will consequently respond to the trust relations that are communicated by the organization. Creed and Miles (1996) expand on this by arguing that managers play a central role in determining the overall level of trust within organizations and by doing so create an overlap between managerial trust and organizational trust. Tan, et al. (2000), maintained that the employee's trust of an organization is also related to what is termed organizational justice and perceived organizational support. Organizational justice is the degree to which those affected by allocation decisions perceive that those decisions were made according to fair methods and guidelines. It is also related to the employee's perceptions of equality in the allocation of resources and outcomes. Perceived organizational support is the overall belief of the employee that the organization values their contributions and is concerned for their well-being. Consequently when the employee feels that the organization has treated them well, an obligation is created within the employee that they should treat the organization well in return (Tan 2000).

Tan, et al., (2000) expanded upon the idea further and argued that organizational commitment and turnover intentions are the observable outcomes of trust in organizations. Maranto and Skelly (2003) define commitment as the psychological strength of an individual's attachment to the organization while Lahiry (2004) defines it as the relative strength of an individual's identification with the organization and involvement; the overlap of these definitions is obvious and serves as a foundational definition of commitment. Employees who trust the organization will be more likely to enjoy working in the organization and will therefore be more likely to be interested in pursuing a long-term career in the organization. Therefore, such employees are less likely to leave the organization of their own volition. Organizational trust also presents itself in the forms of a bilateral communicative environment, perceived fairness and transparency in decision making, and the minimization of a political atmosphere.

Borgen (2001) argues that strong group identification is a significant trust-making mechanism. When trust is based on identification with the other's desires and intentions, trust exists because the parties effectively understand and appreciate the other party's needs and wants. Both parties have a mutual understanding and each of them can act for the other and both will also be confident that his/her interests will be protected. Identification based trust develops when both parties know and predict the other's needs, preferences, and choices and concurrently share some of those needs, preferences, and choices as one's own (Lewicki 1996). Trust may also allow a person, group, or organization to become more dependent on others, but the overall advantage of identification-based trust is that both of the parties can act independently, knowing their interests will be met in the long run (Borgen 2001). Such bilateral trust can be viewed through the lens of the trust that an employee places in his or her manager, as referred to as managerial trust, or that is placed within the organization, also referred to as organizational trust. In this manner, and for

the purposes of this study, organizational trust is defined as the trust that exists between an individual employee and the organization as a whole. Such trust presents itself in the organization through the empowerment of employees to make decisions, on-going supervisor feedback, visibility given to the decision making process, the flexibility to achieve goals, and the implementation of employee ideas.

### **3.0 Conceptual Model**

The applicability of contextual ambidexterity, as well as the impact of social support and performance management on creating a high performance context within the environment of a mature manufacturing organization was explored through the use of a conceptual model. Birkinshaw and Gibson (2004) argued that an organization's context was defined by four separate attributes, namely discipline, stretch, trust, and support. When paired up, stretch and discipline combine to form the construct of performance management and is centered on enabling employees to deliver consistent quality results while also holding them accountable for their actions. Social support is a result of the combination of trust and support and centers on providing employees with the latitude and security necessary to perform at a high level. Within the concept of contextual ambidexterity, performance management and social support are symbiotic and equally important. When both are present, Birkinshaw and Gibson (2004) argued that a high-performance organizational context is created and a true ambidextrous organization is born. They also argued that if there is an imbalance in these characteristics, or an overall deficiency of one or the other, or both, a suboptimal organization will exist. One such context is the lack of social support in an organization with a high performance management context. Birkinshaw and Gibson (Gibson and Birkinshaw 2004) termed this a burnout context where employees can be aligned, but not adaptive and therefore cannot achieve a high performance



context and therefore employees will not be contextual ambidextrous. When this ambidexterity is not achieved, overall unit execution falls short being high performance.

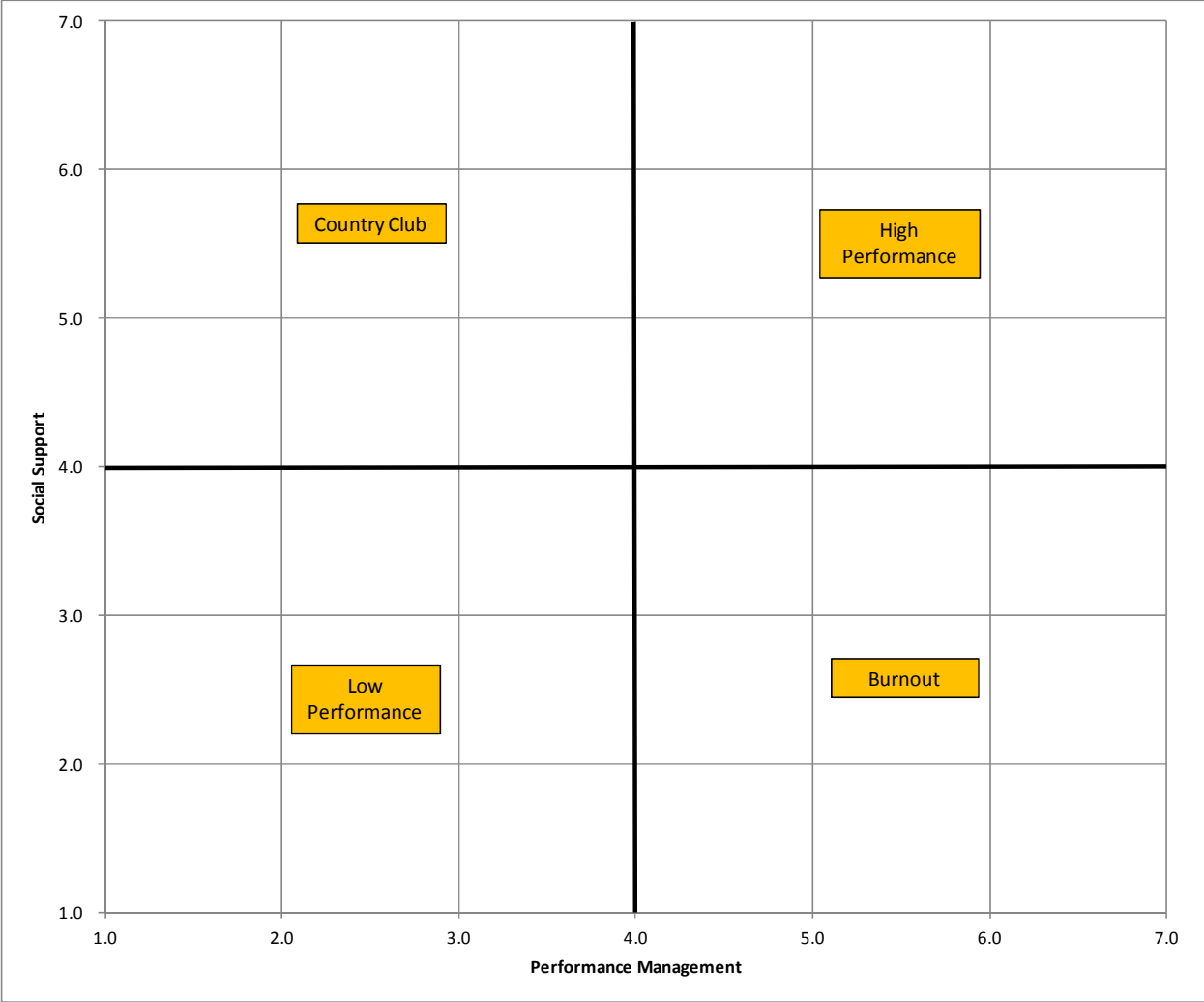
Birkinshaw and Gibson (2004) also argued that increased performance management within the business unit was positively related to achieving contextual ambidexterity and therefore also positively related to increased business unit performance. In addition, previous research, including that by Birkinshaw and Gibson (2004) is impacted by burnout and has demonstrated that employee burnout has negatively related moderating impact on performance management, in that as burnout increases, performance management decreases.

Birkinshaw and Gibson (2004) argued that social support within the business unit was positively related to achieving contextual ambidexterity and therefore also positively related to increased business unit performance. Social support is typically characterized by trust within the organization, alignment between employee expectations and organizational culture, employee communication and participation programs, and employee emotional support.

Therefore, the conceptual model utilized in this research study is the two dimensional table first proposed by Birkinshaw and Gibson (2004) where the horizontal axis measures performance management and the vertical axis measures social support. In addition, the model is divided into four distinct quadrants representing low performance, a 'country club' environment, a burnout environment, and a high performance environment. Individuals, departments, and organizations would be placed in the model based on diagnostic survey results. An illustration of the model can be found in Figure 1. In this illustration, the numerical scales align with the seven point scale embedded in the questionnaire utilized by Birkinshaw and Gibson (2004). This model was used to define which departments were operating in the high performance quadrant and those

that were in the low performance quadrant. In following this methodology, the research was then able to identify the departments from where to draw interview targets.

**Figure 1**

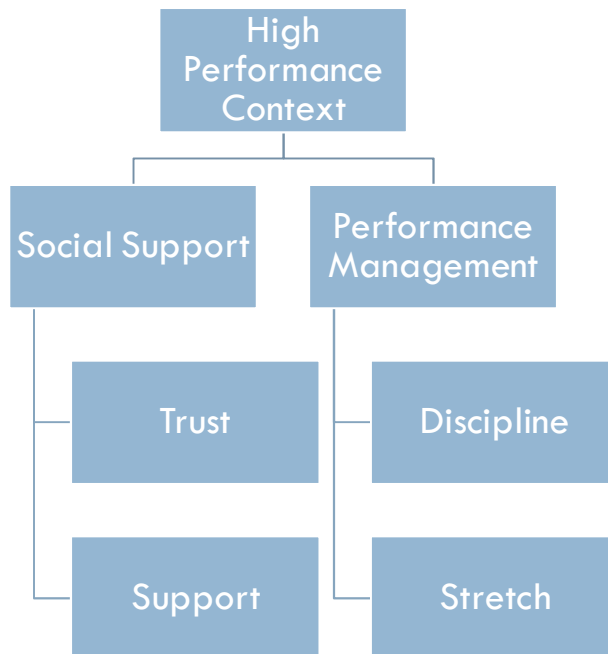


By utilizing this conceptual model, it was possible to diagnose the current state of the organization from three different perspectives: that of the individual, the department, and the organization as a whole. For the purposes of this research, it was necessary to focus on the departmental measurement of creating a high performance context that could lead to individuals becoming contextual ambidextrous within the model. After the initial diagnoses, interviews

were conducted to determine the antecedents of a high performance context at the departmental level of the organization. To be clear, this research provides more refined definitions and measures of existing as well as new constructs of the antecedents of contextual ambidexterity. These new constructs and definitions will be explored in further detail in the findings sections.

In their article on the antecedents to organizational ambidexterity, Birkinshaw and Gibson (2004) identify four potential antecedents to a high performance context. Specifically, they list stretch, discipline, support, and trust as antecedents to ambidexterity. They succinctly demonstrate that trust and support are antecedents to social support while discipline and stretch are antecedents to performance management. The structure of these antecedents can be found in Figure 2. This structure served as the foundation for the findings related to the antecedents to a high performance culture of this research.

**Figure 2**



## 4.0 Research Methodology

This research followed a single case study methodology that allowed a high level of immersion into the context and environment of the target organization and also allowed for a full understanding of the influences on the phenomenon of interest. However, it is also recognized that in spite of its strengths, a single case study methodology is not without its limits, both of which will be explored later in this text.

Upon the conclusion of the study a proposed framework for future research is proposed and should allow others to relate their experiences to those reported in this project. In addition, Richardt and Cook (1979) note also that generalizability depends on more than sample size and thus, “there is no reason quantitative results should be inherently more generalizable than qualitative results”. This is due to the fact that generalization is a far more inductive process than simple statistical projection of a sample to the population. Although a large and diverse set of cases can aid in such generalization, ‘so can a depth of understanding of a single case’.

Therefore, this paper will offer a broader understanding of the phenomenon of creating a high performance context that could lead individuals to becoming contextually ambidextrous, as well as providing an extensive depth of understanding, within the context of a mature manufacturing company.

Given the level of access the researcher had with the organization of interest, specifically since he was formerly employed within the firm, the research project offers a very rich case. The number of interviews with current employees, interviews with former employees, the researcher’s level of access within the organization, and the usage of a survey instrument offered a very in-depth insight. However, it is also understood that as a former insider, a certain level of

bias is to be expected. Throughout the research project, the researcher worked to minimize such biases through reliance on data as opposed to his own personal observations of the organization.

#### **4.1 Case Research**

For the purposes of this study, the definition of case research is based on Benbasat, Goldstein, et al. (1987), Bonoma (1985), Eisenhardt (1989), and Yin (2009). These researchers define a case study as using multiple methods for data collection from a single to multiple entities by a direct observer in a natural setting that takes into account the temporal and contextual aspects of the phenomenon being studied, without experimental controls or manipulations. The methods employed may include both quantitative and qualitative approaches, and also may be constructed to be both obtrusive and unobtrusive. Data collection may rely on financial data, memoranda, interviews, business plans, organization charts, tools and other physical artifacts, questionnaires, and observations of managerial or employee actions and interactions.

In case research, the objective is to understand as completely as possible the phenomenon being studied through ‘perceptual triangulation’ (Bonoma 1985), with the accumulation of multiple data references as sources of evidence to ensure that the facts being collected are correct. An important consideration is that understanding can only be considered knowledge within the restrictions of the researcher’s perceptual framework. Therefore, understanding is not out there, waiting to be discovered in the rationalist sense, and therefore this work cannot stand by itself. Instead, the understanding that is realized is only significant within a framework of assumptions, perspectives, and beliefs determined by the researcher, most frequently his or her own. Hence, the conclusions are embedded with bias and cultural taint. Case study is founded upon the important concept of direct observation in the first person, which is seeing an occurrence as it

happens, rather than in the second person, that is speaking or writing to someone who saw or experienced it. It is also distinctive from data collection in the third person or with no source at all. First person data collection is important in understanding the role of the context in which the phenomenon being studied is occurring, a vital consideration in endeavors at generalization. In addition, the fundamentals of the temporal aspect through which the events of the concept unfold, further aiding in the understanding of the how and why elements of the concept. In the research purposed, the case study is confined to a single setting and therefore is by definition a single case study.

Benbasat, Goldstein, et al. (1987), identify three fundamental strengths of the case study approach. First, the concept can be studied in its natural setting and significant, relevant theory can be generated from the knowledge gained through observing actual practice. Second, the case method permits the meaningful question of ‘why’ to be asked, instead of limiting the outcome to the usual questions of ‘what’ and ‘how’. The ‘why’ question can be answered with a relatively full understanding of the nature and complexity of the complete circumstance studied. Third, the case methodology lends itself to early, exploratory studies where the variables may currently be unknown and the phenomenon not very well understood. This third advantage will be exploited in this case where the researcher will seek to understand the antecedents of creating a high performance context that may allow individuals to become contextually ambidextrous in the manufacturing environment. Yin (2009), McCutcheon and Meredith (1993), and Eisenhardt (1989) identify other advantages of the case method such as its potential for testing hypotheses in well-described, specific situations and the richness of its explanations. As a methodology, case studies are useful for investigating existing theories but, due to the time and effort involved, are

principally practical when developing new theory or examining specific issues or aspects of an extant theory.

Case research, however, is not without inherent disadvantages. As Meredith (1998) succinctly pointed out, among the difficulties of doing case research are the fundamental necessity of direct observation in the actual contemporary situation, cost, time, access hurdles, the need for multiple methods, tools, and entities for triangulation, the lack of controls, and the complications of context and temporal dynamics. In addition, another complex disadvantage of the case method is the lack of familiarity of its procedures and rigor by other researchers. As an example, Aldag and Stearns (1988) point out that qualitative research, in general, is frequently perceived as having a tendency for poor validation, construct error, and questionable generalizability. To effectively counter this, Johnston, et al., (1999) developed a three step framework to increase the validity of the case methodology. Specifically, the research must first begin with hypotheses grounded in theory. Next, the research design must be logical and systematic. Finally, the findings are required to be independently assessed; as part of this research process, this three step process will be followed.

In addition, the case study approach has not always been accepted as a proper scientific method. The main argument against the methodology has been that case studies provide little foundation for scientific generalization (Yin 2009). As an example, Weick (1969) argued that case studies are too context specific and, therefore, not appropriate for generalization. However, in the second edition of the same book, he concludes, with a nod to ‘noted investigators’, that case studies “are better tools than first imagined” (Weick 1979). The revised attitude is attributed to an evolving insight that “findings are unstable over time.” Both Weick (1979) and Cronbach (1975) recommend that researchers endeavor to ground interpretations that are specific to situations and

contexts. To phrase their findings differently, issues that were previously regarded as problematic were now recognized as a strength. Findings from a specific case, for example those grounded within a specific environmental context, should be considered a foundational strength rather than a methodological weakness. The interface between a phenomenon and its context is best comprehended through in-depth case studies, as is purposed herein. As time has worn on, the case study methodology has become an increasingly common method in many scientific fields. As pointed out by Yin (2009), the case study methodology is used extensively in widely ranging areas such as psychology, political science, sociology, history, anthropology, economics, public administration, social work, management, and education.

However, Yin (2009) remained judiciously critical of some case study research, stating that:

too many times the case study investigator has been sloppy and has allowed equivocal evidence on biased views to influence the direction of the findings and conclusions.

Yin states that case study research is extremely hard to conduct correctly, despite the fact that it has been considered a 'soft' approach. He makes the case that the softer the research approach, the more difficult it is to conduct. Easton (1995) built upon Yin by identifying three key weaknesses within a case study methodology. First, some investigators believe they are conducting case studies but instead are simply providing rich descriptions of events from which the reader is expected to draw their own deductions. Second, some case studies are simply accumulations of data that seem to provide incomplete support of specific theories or frameworks and are utilized in a quasi-deductive theory testing manner. Third, some researchers employ multiple "case studies" in a manner that suggests that the researcher are relying on some sort of statistical generalization.



Weick (1979) provides similar criticism regarding the first type of weakness where he states, “many pseudo observers seem bent on describing everything, and as a result describe nothing.” His proposal for resolving this issue is to “invest in theory to keep some intellectual control over the burgeoning set of case descriptions.” A stronger reliance on theory may also aid in reducing the detrimental effects of the second weakness identified by Easton (1995). In addition, utilizing a theory should also improve the explanatory power of case studies.

The literature on case research typically differentiates between single and multiple case studies. As Meredith (1998) summarized, there is a general opinion that multiple cases and replication provides better explanations than single cases (Eisenhardt 1989, Miles and Huberman 1994, Yin 2009). However, Meredith (1998) also stated that “such attitudes are relics of the times when situation specificity was considered a weakness”. This researcher chooses to agree with Meredith (1998) who, like Easton, argued that some researchers tend to employ multiple cases in a way that suggests that they rely on some notion of statistical significance.

Meredith (1998) also pointed out the logical flaw in increasing the number of cases within a study for its own sake. He stated:

The advantages gained by increasing the number of cases are countered by certain disadvantages. This trade-off might result in negative effects. They seek to do a number of case studies as if greater numbers, by and of themselves, increased the explanatory power of what they have been doing.

Easton (1995) in his explanation of the weaknesses of multiple case studies, went on to show that researching greater number of cases, with the same resources, means more breadth, but less depth.

As Dubois and Gadde (2002) pointed out, when the research problem is focused on comparison of a few specific variables, the expected choice is to increase the number of observations. In such circumstances, the research study should be focused on statistical inference. However, when the research question is focused on the analysis of a number of interdependent variables within a complex structure, the expected methodology would tend to go further in depth into a single case, instead of increasing the number of cases. Dubois and Gadde (2002) stated that “it is difficult to comprehend how a little depth and a little width could contribute to the analysis of any problem”.

## **4.2 Abduction as the Research Philosophy**

A deductive argument is a line of reasoning in which it is believed that the premises that precede the argument provide an assurance of the truth of the conclusion (Van de Ven 2007). Inherent in deductive logic is the reasoning that the premises are intended to provide support for the conclusion that is robust enough that, if the premises are true, it would be not possible for the conclusion to be untrue. On the contrary, an inductive argument is an argument in which it is thought that the premises provide support for the probable truth of the conclusion. In an inductive argument, the premises are anticipated to be so strong that, if they are true, then it is doubtful that the conclusion is false.

The primary distinction between the two methodologies is inherently found in the relationship the author assumes between the premises and the conclusion. If the author argues that the truth of the premises definitely establishes the truth of the conclusion then the argument is deductive. Conversely, if the author of the argument does not believe that the truth of the premises

definitely establishes the truth of the conclusion, but nevertheless believes that their truth provides good reason to believe the conclusion true, then the argument is by definition inductive.

In essence, deductive arguments are those where the validity of the conclusion is thought to be certain and not just made probable by the certainty of the premises. Inductive arguments, on the contrary, can appeal to any item that might be thought related to the likelihood of the truth of the conclusion. Inductive arguments can therefore be found in a variety of methodologies, including arguments dealing with generalizations from past experience, statistical data, and causal relationships. Ultimately, the distinctions between inductive and deductive arguments involve the weight of evidence the author accepts the premises provide for the conclusion.

Deduction and induction are two primary features of scientific literature. As an example, some social science researchers (Glaser and Strauss 1967) maintain that inductively developed, grounded theory is improved over other methodologies in the ability to develop theory that is formulated by logical deduction from prior theory. It is accepted that the methodology of grounded theory is that of pure induction where, according to Eisenhardt (1989) there is “no theory under consideration and no hypothesis to test”. However, Strauss (1987) further developed the theories postulated by Glaser and Strauss (1967) and acknowledged that in practice it is challenging to ignore the theory accumulated in one's mind before beginning the research process. Thus, beginning the research process without prior assumptions is neither practical nor preferred.

In addition, it is improbable that any researcher could wholly separate the two processes of induction and deduction as, according to Richards (1993), they “both are always involved, often simultaneously,” and “it is impossible to go theory-free into any study”. In addition, Popper and

Popper (1979) maintained that all data are theory-loaded. Also, Parkhe (1993) argued that some prior theory can have a pivotal function in the design of a research project. For this study, it is admitted that the prior research on contextual ambidexterity within immature industries unquestionably had an impact on the research framework. Perry and Jensen (2001), continue the argument by claiming that "induction with no prior theory might prevent the researcher from benefiting from existing theory, just as pure deduction might prevent the development of new and useful theory". Parkhe (1993) concludes by arguing that "both extremes are untenable and unnecessary" and that the development of ongoing theory requires "continuous interplay" between the two.

This study followed a more traditional inductive based, grounded theory approach utilizing past research in contextual ambidexterity as a guide. Grounded theory employs the characteristic of limited generalizability to other specific situations; this is due to grounded theory expressly setting out to develop theories about a specific, in-depth, social phenomena. In addition, grounded theory has traditionally relied on data collection techniques, such as interviews and observations in natural settings that are gathered in ways that evolve as the research progresses.

Traditional grounded theory begins analysis soon after the data collection process begins. The analysis builds theory through a methodical process, as opposed to the very flexible methods employed by ethnographic research. These steps of data collection and analysis continue until saturation is believed to have been reached, instead of progressing to some pre-determined point. The influence of prior theory is purposely guarded against until after the data has been gathered (Pettigrew 2002). At that time, but only after data analysis has been completed and a grounded theory has been developed, comparisons with other theories about other contexts are allowed. In keeping with this methodology, Birkinshaw and Gibson's (2004) work on the antecedents to

contextual ambidexterity was purposely not read until after the final stages of data collection were complete.

As Perry and Jensen (2001) pointed out, a modified version of grounded theory has been used more frequently in Europe, being termed the 'quasi-inductive approach' and 'abduction'. This approach has proven appropriate if the researcher has already mastered the literature before going into the field. Such an approach allows the development of pre-categories from other theories before the sampling and coding processes begin, for use in those processes (Skytte 1992). As Perry and Jensen (2001) described the methodology, it enables the researcher to be aware of a number of dimensions of the phenomenon to be studied at the beginning of the study. Within this methodology, the prior arguments are not included to perform verifying, theory-testing upon; rather, they are merely tested within a real-world, empirical context for contextual re-specification, enhancement, or elimination. A fundamental position in the succeeding stages of the research progression is that the management of lingering elements should follow the same testing process as traditional grounded theory. In essence, dimensions that are not plausible within the data are eliminated during the data analysis process and newly uncovered dimensions are added. One distinct advantage of this tailored approach to grounded theory is that it combines associations with extant theories to the specified fundamental principles of data sampling and analysis from grounded theory. Jensen (2001) also proposed that a theory-testing version of this particular form of grounded theory could be employed to explore if a prior, formal theory was applicable to a particular, empirical context. It is this theory testing, inductive application of this specific type of grounded theory that is the focus of this study.

### **4.3 The Researcher-Client Agreement**

As the project is initiated, a formal researcher-client agreement (Susman and Evered 1978, Davison, Martinsons et al. 2004) was implemented and signed off on by both the researcher and the target company; this document approves both the research theme and the methodological approach to researching the dilemma. The agreement also specifies the responsibilities of the involved actors and outlines a timeline regarding the steps in the research process (Mathiassen 2002). The researcher's participation was financed through private funds, while the client organization financed its own involvement. Prior to the project's implementation, the researcher met with the Senior Management Team (SMT) of the organization to present the proposed research project. The SMT was advised of the proposed research process and was asked to empower the researcher with the necessary responsibilities to properly conduct the research. The SMT of the target organization agreed to the proposal, and asked that they be advised of all findings of the research.

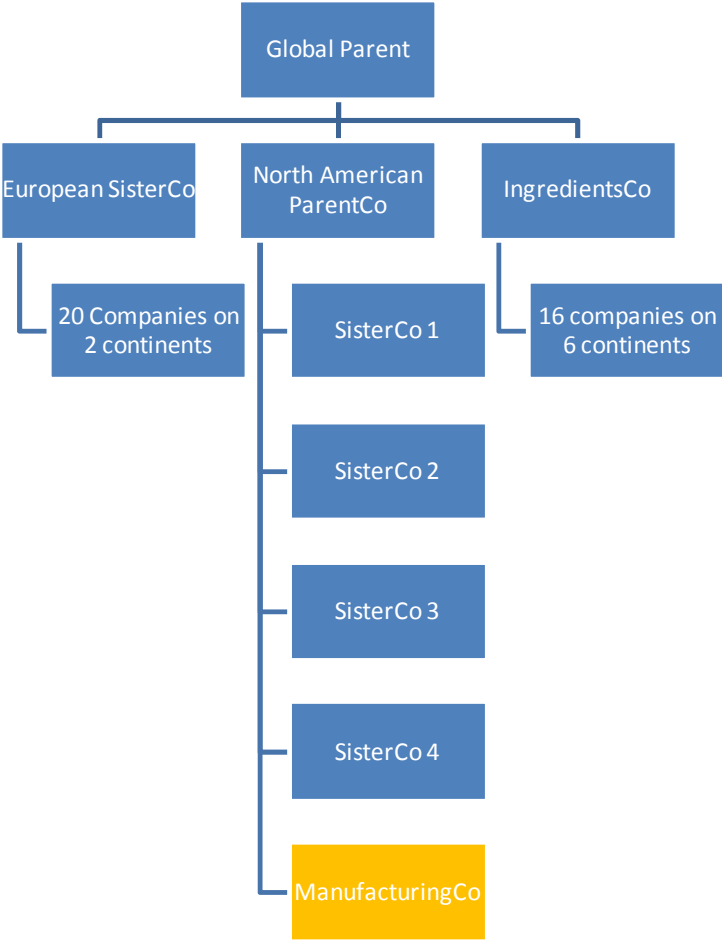
### **4.4 Case Background**

This sections draws extensively from the two latest available annual reports for the organization of interest for fiscal years 2010 and 2011. Please note that the company has requested to remain anonymous and therefore all references to their name and industry have been adjusted to meet this request. Also, in order to maintain this anonymity, the annual reports are purposely not cited.

Global ParentCo is one of the world's leading suppliers of a specific type of food product as well as other food related ingredients and is organized worldwide in two divisions: North American ParentCo and SisterCo. Global ParentCo operates on six continents and generates annual sales

of nearly \$4 billion and has a workforce of approximately 9,700 employees in 28 countries. An organization chart detailing the structure of the company can be found below in Figure 3.

**Figure 3**  
**Global Organization**



ManufacturingCo, the specific organization of interest in this single case study, is a division of Global ParentCo, offers a full line of ingredients and food products, and operates exclusively within the borders of the United States. The bakery product portfolio ranges from premium finished and semi-finished pastry products, such as decorated cakes, donuts, muffins, European

style viennoiserie, and American style cookies. They primarily sell these products as frozen goods to industrial bakeries, supermarkets, takeaway establishments, coffee chains, and caterers. ManufacturingCo is the largest division of the parent organization with annual sales revenue exceeding \$1 billion.

In May 2012, the parent company, Global ParentCo, announced its intent to divest the division being studied by the third quarter of 2013. As of the gathering of the data for this dissertation, no buyer had been identified; however, the company is in the process of compiling the necessary due diligence data to facilitate its sale when such a buyer is announced. In addition, this announcement has increased the stress level within the personnel of the organization being studied as it bodes as an unknown for their career aspirations with the company.

### **Current Challenges**

In 2010 and 2011, ManufacturingCo's core markets did not experience a recovery from the economic downturn; most markets were stable at best. This was driven primarily by volatility within key raw materials markets, such as sugar, grain, and dairy, in the past years, and this proved to be the case again in 2012, with substantial increases in input costs. Although their raw material purchases were partially covered by longer-term hedges, increasing prices to their customers continues to be a common necessity. Such price increases, lead to additional workload with the personnel being studied. In addition, the increase in commodity costs leads to a downturn of profits, which then causes decreased incentive pay for the personnel being studied. The profit volatility is expected to remain for the foreseeable future as prices are not being influenced by supply and demand, but also by financial speculation, a trend that is not expected to reverse in the near future.



## **Recent Acquisition within ManufacturingCo**

In March 2010, the organization of interest completed one of the largest acquisitions in the history of the global business. The addition of NewCo, with annual sales revenue in excess of U.S. \$500 million, considerably strengthened their market position within the United States. However, the acquisition also forced the merger of two disparate corporate cultures and greatly added to the complexity of the organization. During 2010, NewCo was fully integrated in ManufacturingCo's strategic platforms, with the predominant share of NewCo's organization being integrated within ManufacturingCo; a small portion of NewCo was integrated into one of ManufacturingCo's sister companies. Together, the two organizations have a rich 125-year history of manufacturing baking ingredients and products; a key indication of the maturity of the organization.

The quick and thorough integration of NewCo in 2010 proved to be a distraction and therefore took much energy from the organization. In addition, in an effort to quickly capture synergies the organization rapidly terminated duplicate employees and reorganized the combined entities primarily on their U.S. campus. In 2011 further streamlining of the organization was initiated, and as such, ManufacturingCo reviewed the manufacturing base of the combined companies in order to improve utilization, to reduce complexity in the supply chain, and to maintain an adequate geographic footprint. This resulted in the closure of two manufacturing facilities, which was announced in February 2011. In addition, throughout 2011 further workforce reductions were made resulting in a lean organization with nearly all headquarters type functions located in the U.S.

## **Structural Ambidexterity**

Innovation is touted as a key differentiator in ManufacturingCo's strategic positioning, from those of their competitors, and is purposed to drive their future growth. In recent years, they have consolidated their innovation activities to focus resources and deepen expertise. Their management has espoused that their customers recognize their innovation capabilities and view their distinctive services as a competitive advantage. The innovation functions at ManufacturingCo are organized through two main channels. First, the company has established Product Development Centers that are located close to their customers and secure a swift response to customer demands. These centers are tasked with providing existing customers with refinements to existing products as well as reducing the cost of producing existing products. In essence, this represents the exploitation construct of structural ambidexterity. The company also has established Innovation Centers that focus on longer term technological development that represent the exploration construct of structural ambidexterity. These structures are organized separately, as is typically required in structural ambidexterity.

Product development centers are organized to have a strong local and regional presence and an in-depth understanding of their market. They are supported by the expertise of their global network and operate closely to the business, acting as a business partner for our customers. They are tasked with refining existing products for existing customers as well as economizing current production practices. In 2011, these were folded into a new product category structure in order to place these closer to the needs of the company's customers.

Innovation Centers are primarily focused on anticipating global trends and merging this with consumer insights and input from the Product Development Centers. These organizations devise an innovation strategy, based on the Global ParentCo's strategy, to develop original solutions

through a portfolio of projects. They help the organization to meet the challenges that arise from changing consumer and customer demands, market developments, new technologies, and emerging legislation and regulations. The centers from all divisions collaborate extensively with each other, exchanging ideas, product and processing technologies, knowledge of raw materials, and best practices. In essence, the organization has structured itself in parallel with the concept of structural ambidexterity; however, this research explores the ability of the firm to achieve contextual ambidexterity and the impact of organizational trust on such ambidexterity. In the view of the researcher, the organization has unintentionally aligned itself within the tenets of structural ambidexterity, and has not made such a shift towards contextual ambidexterity.

### **Talent Acquisition**

In North American ParentCo, the organization launched its first MBA leadership program in 2011. In selective universities, MBA students with five to ten years of working experience were interviewed on campus and subsequently selected for employment. The purpose of the program is to hire and develop, through selective rotations, future leaders for the company. Internal candidates were encouraged to participate in the program as well; however the researcher could find no cases where an internal candidate was selected to participate in the program. As a result of the pilot, the first MBA students started mid 2011.

In addition, Global ParentCo claims to provide development opportunities through formal and on the job training, challenging projects, international experience and exposure. They also seek to expand their leadership development and training programs aimed at producing the new generation of leaders that will maintain ManufacturingCo's market leadership. ManufacturingCo currently has several different management development programs in place including programs that target high potential mid level and senior managers. These programs focus on improving

personal and managerial skills, improving stakeholder management, operating more effectively in an international environment and gaining in-depth knowledge about the company. The higher level programs focus on improving strategic insights and managerial skills, enhancing influencing abilities, learning to apply the advantage of the cultural differences within the company, sharing best practices, and helping people to manage change. These talent development programs aim at both developing social support and performance management with the organization. However, with the expected forthcoming divestment, both the MBA hiring program and the internal management development programs have been suspended within the organization being studied.

In addition, Global ParentCo has established a “Social and People Policy” that is based on clear principles. They consistently monitor adherence to these principles and constantly monitor their approach to ensure they are being met. They are:

1. Recruit, develop, and promote employees on the basis of the talents and skills required for the job;
2. Provide safe and healthy working conditions;
3. Offer a varied and challenging career;
4. Encourage and support individual and team initiatives to further improve the results, reputation and growth potential of Global ParentCo, and;
5. Strive for performance excellence and related rewards.

As written, these policies would seem to promote a high performance context that could lead to individuals becoming contextually ambidexterous and this study measures how well such

policies are being practiced. As is shown in subsequent sections, the initial survey instrument demonstrates that the company rates relatively high in performance management but low in social support, despite policies to the contrary. Therefore, the company is not, by definition, contextually ambidextrous.

## **4.5 Research Process and Results**

The data collection process occurred over approximately six months and utilized several data sources. Namely, the researcher utilized a survey instrument, semi-structured interviews, archival data, and participant observation. It was expected that the survey instruments and informant interviews would be the primary source of inductive data, an expectation that proved true. In addition, archival materials and observations were utilized to expand the understanding of the case context, such as the strategic, operational, and cultural features embedded in the organization. Also, the data collected were utilized to offer insights to both refute and reinforce the survey and interview findings (Forster 1994).

Yin (2009) maintains that multiple sources allow the researcher to speak to a wider range of attitudinal, historical, and behavioral subjects. In addition, Yin argues that any findings or conclusions grounded within a case study are expected to be “much more convincing and accurate if it is based on several different sources of information following a corroborative mode.” Therefore, the multiple data sources utilized in this study lent credence to the scientific merit of the study as a whole.

### **4.5.1 Survey**

A survey instrument designed to measure the organization’s current state of achieving a high performance context that could lead to contextual ambidexterity was utilized; this instrument was

sent to all salaried and exempt employees who worked at the company's U.S. campus. A narrative detailing the propagation and finding from this instrument can be found in subsequent sections. Through the literature review on contextual ambidexterity, the researcher was able to identify several key areas of investigation that aided in the initial diagnoses of the company's current state of creating a high performance context. Specifically, the instrument was constructed to measure the two areas identified in the conceptual model, specifically performance management and social support. In addition, the survey instrument measured the organizational trust and burnout. Prior to distribution, the instrument was reviewed with the company's Human Resources department. As expected, the Human Resources department did not desire to change these areas of focus; instead, they asked to amend a few of the specific questions posed to the survey recipients. Quite beneficially, practitioners and researchers brought their historical knowledge to aid in the comprehension of the issues related to the problem situation. After this initial meeting, the survey instrument was quickly, but thoroughly, adjusted to reflect the desired changes, and overall it continued to reflect the focus of this project, a better understanding of creating a high performance context that could lead to contextual ambidexterity.

The diagnostic survey instrument contained questions divided into six distinction sections. The first section gathered demographic information concerning the respondent. The second section was concerned with social support; these two sections, when combined were designed to measure the organizations current performance context. It is important to note that the first two sections were almost exactly identical to those utilized by Birkinshaw and Gibson (2004). The next sections were designed to do a deeper dive into the antecedents of creating a high performance context, specifically burnout and trust. In addition, the survey gathered data concerning current job satisfaction and the respondent's perception of firm performance.

Embedded in each section was a reverse scaled dummy question designed to tease out respondent accuracy. The actual questions for these sections were drawn from previous research studies. Specifically, the burnout section was from the Maslach Burnout Inventory (Maslach and Jackson 1981) and the trust questions were from Shockley's *Measuring Organizational Trust* questionnaire (Shockley-Zalabak, Ellis et al. 2000). The questionnaire ended with further demographic questions. However, the research agreement did not allow for the collection of information that would have identified the individual respondents. Therefore, it was important to collect accurate demographic information. By collecting dependent and independent measures from several different levels within the organization, as well as different departments and lengths of service, the problems often associated with common method variance were avoided.

Within the performance management, social support, burnout, and trust sections, the respondents were asked to rate the frequency of behaviors of their managers on a seven point scale that included a numerical equivalent of time associated with each point in the scale. As an example, a response of 'Never' was to be indicated if their manager exhibited the queried behavior less than 10% of the time. It is important to note that this numerical rating, as well as the dummy questions, was not included in Birkinshaw's questionnaire. The researcher felt that without the numerical time equivalent, the ratings were too ambiguous and may lead to less reliability in the questionnaire results.

Prior to sending the survey instrument to the mass audience, it was tested on several current and former employees of the target organization. This allowed the researcher to understand if the instrument was clear and concise, and also to permit modifications, if necessary.

The survey was sent to all salaried and exempt employees within the organization located in the U.S. who had both email addresses and internet access. As part of the agreed upon framework, an administrative assistant employed in the Human Resources department sent an email that contained a link to the online survey. The text of the email was composed by the researcher in consultation with the internal sponsor of the research. The actual email can be found in the appendix. According to the administrative assistant, the email invitation was sent to approximately 250 potential respondents. As is seen in the invitation, the survey initially sent on September 20<sup>th</sup>, 2012 and was available for response for two weeks. Reminder emails were sent to the same list of invitees on September 26<sup>th</sup>, 2012 and again on October 3<sup>rd</sup>, 2012.

The instrument was internet based via Qualtrics, a leading on-line survey provider that has been utilized in previous research studies. All recipients received the same instrument which consists of both Likert scale queries and open ended questions; the actual instrument can be found in the appendix. Recipients were allowed ten days to complete the form and received reminders when the form was not yet complete.

After the deadline for completion has passed, the results were accumulated via Qualtrics. The Likert scale items were statistically analyzed via Excel and SPSS, to aid the researcher in understanding the trends within the data. The open ended questions were interpreted via NVivo, a qualitative data analysis computer software program. Each question was analyzed separately to allow for the detection of trends within the data, and the results were then accumulated by subject area. The researcher also examined the data for differences between departments and physical locations within the organization. Utilizing the Likert scale and the open ended data, the data was interpreted and the current state of the organization within the framework of creating a high performance context that could lead to contextual ambidexterity was determined.



Specifically, the data was utilized to determine the current performance context, the levels of burnout and organizational trust, and was also used to further refine the interview guidelines and targets.

Within the timeframe allowed, 160 total responses were received, of which, 141 were usable.

Therefore, the usable response rate was estimated as 56%, and deemed valid. The unusable responses were discarded primarily due to the respondent quitting the survey prior to completion.

The number of responses by self-identified departments can be found below in Table 1.

Unfortunately, the target organization could not provide the number of survey invitations sent to each department, so it is impossible to determine the departmental response rates.

**Table 1**

**Survey Responses by Department**

<b>Department</b>	<b>Responses</b>
Sales	6
Marketing	8
Category	11
R&D	18
Finance	43
HR	4
Cust. Serv.	14
Operations	18
Division	1
Did Not Identify	18
<b>Total</b>	<b>141</b>

Given the estimated high response rate, it is believe that the employees participating in this study are representative of the overall population within the target organization.

## Validity of Survey Instrument

For the purposes of this survey, a high performance context is defined as the presence of high levels of both performance management and social support. In the survey, performance management was measured using seven valid questions, all sourced from the Birkinshaw and Gibson (2004) contextual ambidexterity survey. In addition, the social support questions were sourced from the same survey but included a dummy, reversed scale question in order to improve reliability. Table 2 that follows provides a more detailed explanation of the reliability of the survey. Overall, the individual items within social support presented loadings that ranged from 0.668 to 0.866, which are adequate. In addition, social support had an alpha of 0.822, well above the desired value. Further, the individual items within performance management presented loadings that ranged from 0.690 to 0.822, which are also deemed adequate. Finally, performance management had an alpha of 0.867, well above the desired value. Therefore, the survey is deemed valid for the purposes of measuring a high performance context that leads to contextual ambidexterity. This finding is extremely important as this study represents the first instance the survey has been tested outside of its original context.

More detail on the specific results as well as the full correlation table can be found in the appendix.

**Table 2**

### Summary of the Final Measures

Construct	# of Items	Scale	Alpha	Range of Loadings	Range of Means
Social Support	6	1-7	0.822	0.668 - 0.866	2.8955 - 4.4436
Performance Management	6	1-7	0.867	0.690 - 0.822	3.0149 - 4.7612

## Validity of Trust Questions

Birkinshaw and Gibson (2004) list trust as an antecedent to ambidexterity and as such the researcher included questions concerning organizational trust in the diagnostic survey. As previously mentioned, the particular questions were sourced from Shockley's (2000) *Measuring Organizational Trust* questionnaire; the specific questions can be found in the appendix. In order to ensure reliability, and similar to the other sections in the survey, questions utilizing a reverse scale were included. In all, the survey included nine questions concerning trust, of which seven were determined to be valid. Table 3 that follows provides a more detailed explanation of the reliability of the survey. Overall, the valid individual questions within trust presented loadings that ranged from 0.628 to 0.862, which are adequate. In addition, trust had an alpha of 0.888, well above the desired value. Therefore, the trust questions in the survey are deemed valid for the purposes of measuring contextual ambidexterity. This finding is extremely important as this study represents the first instance where the trust antecedent has been deemed statistically valid. More detail on the specific results as well as the full correlation table can be found in the appendix.

**Table 3**

Construct	# of Items	Scale	Alpha	Range of Loadings	Range of Means
Trust	7	1-7	0.888	0.628 - 0.862	3.4806 - 4.7578

### 4.5.2 Interviews

After the survey data was analyzed against the concept of creating a high performance culture, the researcher conducted nineteen semi-structured interviews with individuals who were, at the time of the interview, employed at the target company's U.S. campus. To further ensure that the

sample included the most knowledgeable informants, the researcher utilized a “snowballing technique.” Specifically, the researcher asked initial informants to suggest others within the organization who could offer further insight. All interviews were electronically recorded and transcribed verbatim to ensure reliability (Eisenhardt and Bourgeois III 1988). An interview protocol was designed with alignment-adaptability tensions in mind and can be found in the appendix. It is important to note that this protocol did not include the specific words “alignment”, “adaptability”, “tension,” “contradiction,” or “dilemma.” Instead, and in alignment with Spradley (1979), the interviews began with questions covering general topics: company history and structure, current projects, employment history with the organization, relationships with team members and clients, competitors, and a typical workday. In alignment with the ‘snowballing’ concept, the protocol was adjusted based on the results of early interviews, especially concerning the order in which the interview targets were asked the specific questions. The initial interview protocol can be found in the appendix.

Given the inductive perspective of the study, the researcher encouraged informants to wander freely in their answers and probed whenever possible. As expected, the interview protocol evolved systematically as the study progressed. As Glaser and Strauss (1967) recommended, the study began with general research aims. As data collection and analysis developed, the interviews became increasingly focused. The researcher continued enlisting informants until additional interviews failed to dispute existing, or reveal new, categories or relationships; that is, until the researcher achieved theoretical saturation (Corbin and Strauss 1990).

In addition to the interviews of current employees, the researcher conducted two interviews with former employees who had recently departed the organization. These interviews utilized the same interview protocol as that utilized with current employees.

After the completion of the survey, it was clear that interviews should be conducted within the Customer Service and Sales departments to understand why these departments rated so poorly. Conversely, both the Human Resources and Operations departments were targeted to understand why these departments rated so high. It is important to note that the Human Resources department has fewer employees than Operations, so the interviews were more heavily weighted towards the Operations department. In addition, employees from other departments, such as Finance and Marketing, who regularly interact with the previously identified departments, were also identified as interview targets. As seen in Tables 4, 5, and 6, the interview targets were individuals across all professional levels, disciplines, and tenure to enable representative sampling. In addition, Table 7 presents the revised departmental interview statistics when the interview targets outside of the specifically targeted departments (Operations, Human Resources, Sales, and Customer Service) are included in the totals of the targeted departments they most closely triangulate with. It is important to note that one interview target from outside of the targeted department triangulated with three targeted departments.

**Table 4**

<b>Interviews by Department</b>	
Operations	6
Human Resources	1
Customer Service	3
Sales	3
Marketing	4
Finance	4
<b>Total</b>	<b>21</b>

**Table 5**

<b>Interviews by Tenure (years)</b>	
1 year with company	2
2 years with company	3
3 years with company	4
4 years with company	5
5 years with company	1
6 years with company	1
7 years with company	2
9 years with company	1
14 years with company	2
<b>Average Tenure (years)</b>	<b>5</b>

**Table 6**

<b>Interviews by Level</b>	
Executive	4
Manager	9
Staff	8
<b>Total</b>	<b>21</b>

**Table 7**

<b>Interviews by Department Triangulated</b>	
Operations	10
HR	1
Customer Service	4
Sales	8
<b>Total</b>	<b>23</b>

Also, founded upon the survey results, a cross section of targets was chosen based on both their level within the organization, ranging from staff level to executive, and on their time with the organization, ranging from less than a year to over 10 years. In addition, two former employees

were interviewed, one from Category Management who formerly interacted regularly with the Sales department and the other from Finance who was embedded with the Operations department.

The previously discussed interview protocol was fully utilized with all interviewees. As expected, some targets were more open to discussion than others. The shortest interview lasted 27 minutes and was with a customer service staff member, the longest lasted 68 minutes and was with a marketing executive, while the average was 45 minutes. Due to scheduling conflicts, two interviews of current employees were conducted via telephone. The remainder of the current employee interviews were conducted on site, in a confidential setting, and were face to face. One former employee interview was conducted off site face to face, while the other former employee interview was conducted via telephone. All interviewees consented to audio recording of the interviews. All in person interviewees read and signed the voluntary consent and confidentiality agreement and phone interviewees verbally consented to the terms of the agreement. All interviewees were also reassured that their employer would not have access to neither the audio recordings nor the transcripts. These procedures served the dual purposes of assuring necessary confidentiality but also helped to encourage a more frank and open dialog.

After the interviews were complete, the audio recordings were transcribed by a third party in their entirety. During the transcription process, all identifying information was deleted. To ensure the integrity of the transcription process, the researcher compared the transcription to the audio for three interviews.

### **4.5.3 Participant Observation and Archival Data**

Informal, nonparticipant observations were made while interacting with the company's personnel. The researcher, as a former insider to the organization of interest, had particularly excellent access into both the formal and informal meetings of the organization. As such, the researcher was able to examine and take notes of the work environment of the firm. This was especially vital during the company's quarterly 'Town Halls' where every employee was afforded the opportunity to ask questions directly to the company's executives. In addition, the researcher was allowed to attend the regularly scheduled 'Leadership Forum' meetings where a cross-functional team of director level and above employees was assembled to concentrate on the organization's future strategy.

In addition, the researcher utilized archival data to inform the research. Industry reports and internal documents were examined for their potential contribution to the understanding of the climate and culture of the firm of interest. Observations that occurred within meetings, company town hall presentations, and other events beyond the control of the researcher contributed data that would not have otherwise been gathered. These observations generated new insights and questions on which further interviews could be based. In addition, the insights that resulted from unexpected data contributed to further development of the framework and generated the search for complementary theoretical concepts. Therefore, the observations that were available as an insider added new insights to the subject, which ultimately resulted in innovative views of the phenomenon itself and also added clarity to the research that would have otherwise been unavailable.



**Table 8**  
**Data Collection Summary**

<b>Technique</b>	<b>Who</b>	<b>When</b>	<b>Purpose</b>
Diagnostic Survey Instrument	U.S. based salaried and exempt employees with email access.	September - October 2012	To measure the organization's current level of contextual ambidexterity and develop the trends that will be explored through the interview process.
Individual Interviews – Current Employees	U.S. based employees identified by both the researcher and the organization's Human Resources department.	November - December 2012	To conduct an in-depth exploration of the organization's performance management, social support, burnout culture, and organizational trust. The interviews will utilize a snowball technique and will allow for the informing of the impact of the organization's trust level on its contextual ambidexterity.
Former Employee Interviews	Former employees currently residing in the U.S. These were identified through LinkedIn.	November - December 2012	To conduct an in-depth exploration of the organization's performance management, social support, burnout culture, and organizational trust. The interviews utilized a snowball technique and allowed for the informing of the impact of the organization's trust level on its contextual ambidexterity. Former employees proved to be more forthcoming concerning the shortcomings of the organization.
Participant Observation	Employees in the U.S. who attended town hall and leadership forum meetings.	March 2012 – January 2013	To observe the interaction of executives and employees, when the executives made their quarterly town hall presentations. Also, to observe the interaction among high level employees when part of the interdepartmental leadership forum.

#### **4.5.4 Survey and Interview Data Analysis**

The researcher utilized a four-stage data analysis process as outlined by Glaser and Strauss (1967) and Miles and Huberman (1994). Systematic, iterative comparisons of data, emerging categories, and existing literature aided in the development of cohesive constructs and an integrative, theoretical framework. The bias that is considered to be a danger in using a qualitative research approach was overcome in this research through data triangulation. For the purpose of this paper, three types of triangulation are used namely, data, methodological, and interdisciplinary triangulation.

Combining sources of data, while alternating between analysis and interpretation, frequently denotes triangulation (Denzin 1978, Yin 2009). According to Yin, the primary benefit of triangulation is the development of converging lines of inquiry. Huberman and Miles (1994) denote this as “self-consciously setting out to collect and double check findings.” Therefore, multiple data sources may contribute to uncovering characteristics of the phenomenon previously unknown to the researcher.

The first stage is the identification of initial, broad categories within the case. This first step began with the survey data that was utilized to inform the interview process. Next, the researcher utilized the verbatim survey data, as well as the interview transcripts, to identify patterns and variance in the levels of the constructs of interest within the firm, as well as across departments and varying experience with the organization.

To further categorize the raw data, the researcher applied techniques advocated by Van Maanen (1979). Specifically utilizing conceptual coding employing in vivo codes, for example first-level concepts comprised of the language used by informants, or a simple, descriptive phrase when an

in vivo code is not available (Corbin and Strauss 1990). These first-level concepts offered general insights into the constructs of interest.

The second stage involves linking the related first level concepts within the case to the theoretical constructs. In this stage, the researcher searched for the links between and among the first-level constructs, which then facilitated grouping the first level constructs together into second-level constructs. A core aspect of the inductive process is that the researcher allowed concepts and relationships to emerge from the data, rather than being guided by a priori hypotheses (Corbin and Strauss 1990).

In the third stage, the researcher conducted inter-case comparisons of the acquired data, specifically between the interviews, participant observations, and survey instrument. Using standard case analysis techniques (Eisenhardt 1989, Miles and Huberman 1994), the researcher searched for similar concepts and relationships within the case, comparing the categories produced in stage two. Similar themes were gathered into aggregate dimensions that served as the basis of the emerging framework. The researcher then labeled these dimensions, for example performance management, organizational trust, etc., either by summarizing the content at a higher level of abstraction or by referring to extant literature that described highly similar concepts. This process entailed seeking evidence across the case for alignment-adaptability tension descriptors, and is expected to result in many areas of interest.

Similar to the interview, survey, and focus group data, the researcher assessed the reliability of each dimension via two methods. First, the researcher coded every response twice in order to measure the intra-coding reliability. In the case of the few disagreements found, they were resolved through discussion with a third party. Next, the researcher referred to the extant

literature as well as the dissertation committee for input. This method allowed a rigorous interpretation of the data and probed how data fit within the proposed dimensions.

The final stage involved the construction of a theoretical framework as it specifically related to the identification of the antecedents of contextual ambidexterity within the target organization.

In the final stage, the researcher drew upon existing studies of contextual ambidexterity and paradox to refine the labels and understandings. To converge on a parsimonious set of constructs, the researcher focused only on the most robust findings. Throughout the study, it was found that the data collection led to a new search for useful theories, complementary to the general framework, which were then guided by the fact that the empirical observations and the current theoretical framework were not exactly parallel. However, it was recognized that as Glaser (1978) points out, the fit between theory and reality is vital, and argues that data should not be forced to match preconceived or preexistent categories, arguing rather that the categories are to be developed from data.

As previously mentioned, the interviews were recorded both electronically and in writing, and then transcribed, analyzed via NVivo, and the results accumulated and analyzed for trends. The open ended survey data were analyzed in a similar manner. The interview transcripts were coded utilizing an iterative coding process. First, an initial code list was developed utilizing the extant literature as well as the expected responses to the interview questions. Next, several interviews were coded using the initial code list. During this initial coding process, new codes were created based on the gaps between the initial code list and the interview transcripts. In addition, existing codes were refined to more accurately capture the commentary of the interviewees. After seven interviews were coded, the code list was considered final. At that time, the results of the initial

coding were deleted and all twenty-one interviews were coded using the same code list. In addition, at that time the codes were specifically defined and composed so that there was little overlap and that all discussed topics were given adequate attention. The code list, with the corresponding count per code can be found in the appendix.

Within the context of qualitative research, it becomes necessary to ascertain the reliability of the researcher. This is especially true when the researcher has been embedded in the target organization and therefore is subject to inherent and often unintended biases. One method for assuring the reliability of the researcher in qualitative research is to have an independent third party code an interview that was previously coded by the researcher. When this method is utilized, a kappa coefficient is produced and provides a score of inter-rater agreement and is an indication of the degree to which separate observers agree above what would be expected by chance alone (Cohen 1960, Rigby and Robinson 2000).

To assess the reliability of the generated codes and after the interviews were coded by the researcher, a single, uncoded interview, as well as the code list was forwarded to a third party for coding. When returned, the results of this coded interview were compared to the same interview's coding results as coded by the researcher. The comparison shows that there is a high level of reliability in the researcher's coding. Specifically, when the two coders were compared, there was an overall average agreement of 79.15%, and a Cohen's Kappa Coefficient score of .6734, well within the .40 to .75 range considered as fair to good agreement, albeit on the higher end of the scale. Since the Kappa score was within the acceptable range, it was determined that there was no need to have coding disagreements resolved through third party consultation.

Pre-coding discussion with the third party coder noted that without a thorough understanding of the contextual ambidexterity, the third party coder scorer could only rely on his personal interpretation of the given definitions. As such, the third party coder was provided with the interview transcript, the interview protocol, the code list, and the expanded code definitions; the former three documents can be found in the appendix. Since the expanded code definitions and the interview protocol were provided to the third party coder, it was more likely that a higher intercoder reliability would be achieved. In addition, it is likely a stronger kappa coefficient may have been attained through further in-depth training and interaction of the alternate scorer, or using multiple alternate scorers, or a combination of both. Albeit, even without in-depth training, a score within the “fair” range reinforces the adequacy of the definitions utilized and demonstrates sufficient establishment of the findings of the research.

## **5.0 Findings**

As a reminder, the purpose of this study was to explore the antecedents of creating a high performance context within the environment of a mature manufacturing company. This section is organized into several primary subsections. The first subsection explores the results from the survey that informed the interview process. Next, the antecedents of performance management are explored; the next section does the same with social support. The following section describes the moderating effect that differences between managers and departments have on the contextual ambidexterity of the organization. The final section explores an additional finding of this study, namely that the unit of analysis is not the individual, as has been studied in prior research, but instead the unit of analysis is the department where the individual is situated.

## 5.1 Survey Results

As Birkinshaw and Gibson (2004) explain, social support and performance management are mutually reinforcing, as well as equally important. When each are present, a high performance atmosphere is created that, in this sense, relates to contextual ambidexterity. However, when there is an imbalance, as is seen in most departments within the target organization, less than optimum performance is achieved. As is shown in Table 9 and Figure 4, the overall company average is relatively high on performance management, but not nearly as elevated on social support. Individual departmental results yield similar imbalances. In this case, the results oriented environment that lacks social support yields a burnout context. As is seen in this organization, and will be explored in the interviews, most people can perform at a high level for a limited time. However, the lack of social support will tend to yield a higher level of employee turnover and lead to longer term poor performance. In addition, low social support, when coupled with low performance management, as is seen in both the Customer Service and Sales departments yield a low performance organizational context. In this scenario, employees are neither aligned with their job descriptions nor adaptive to organizational changes, and therefore cannot be contextually ambidextrous.

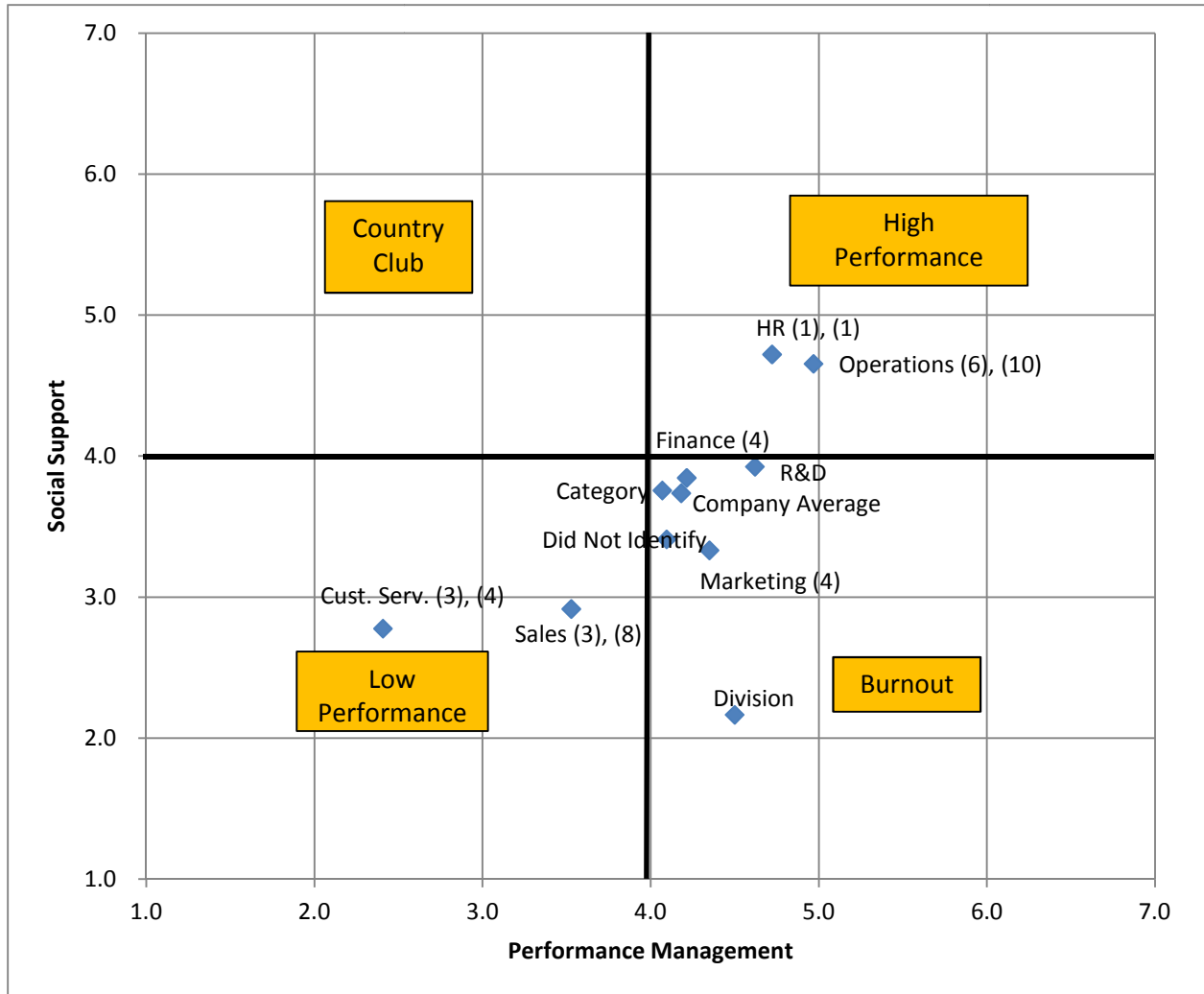
**Table 9**

**Measurements by Department**

<b>Department</b>	<b>Performance Management</b>	<b>Social Support</b>
Sales	3.5	2.9
Marketing	4.4	3.3
Category	4.1	3.8
R&D	4.6	3.9
Finance	4.2	3.8
HR	4.7	4.7
Cust. Serv.	2.4	2.8
Operations	5.0	4.7
Division	4.5	2.2
Did Not Identify	4.1	3.4
<b>Average</b>	<b>4.2</b>	<b>3.7</b>



**Figure 4**  
**Diagnostic Survey Results by Department**



At this point in time, it is necessary to introduce the concept of a high performance context measure as a method of rating the high performance context among different individuals, departments, and entities. The high performance context measurement consists of the product of the social support score and the performance management score. This scale, while one dimensional, allows for a simple comparison between departments measured, and in this specific

case allowed for a more specific identification of the departments where interview targets should be chosen. In this case, it was determined that since the social support and performance management scales measure intermeshed constructs, it would be more accurate to multiply the respective performance management and social support scores instead of simply adding. The intermeshing of the constructs can easily be seen in the statistical analysis of the survey instrument previously presented. It is recognized that if there were no overlap between the constructs and they were truly independent measures, then the sum of the scores would be the more accurate measure. In the survey instrument, and specifically in the performance management and social support sections, the respondent was asked to rate his or her manager on a seven point scale with a range of one to seven. Therefore, when the two measurements, social support and performance management, are measured in the linear scale, the range runs from one to forty nine. A low score would indicate the absence of a high performance context while a high score would indicate the presence of the studied phenomenon.

This single dimensional scale is important in the understanding the differences between the departments surveyed. In western society, owing to the fact that we read from left to right, there is a natural tendency to rate those items to the right higher than items to the left. As an example, this is why rating scales, such as the one utilized in the survey conducted for this study, have the highest rating scores on the right and the lowest on the left. Given this cultural bias, a casual observer, after examining Figure 4, would conclude that the Sales department is has lower performance than Division; after all, Division is located in a quadrant that is adjacent to the high performance quadrant, while Sales is diagonal. However, when the new single dimensional, linear measurement is utilized, it is easily seen that the Sales department is higher performance than Division. The complete results of the linear scale can be found in Figure 5 and Table 10.

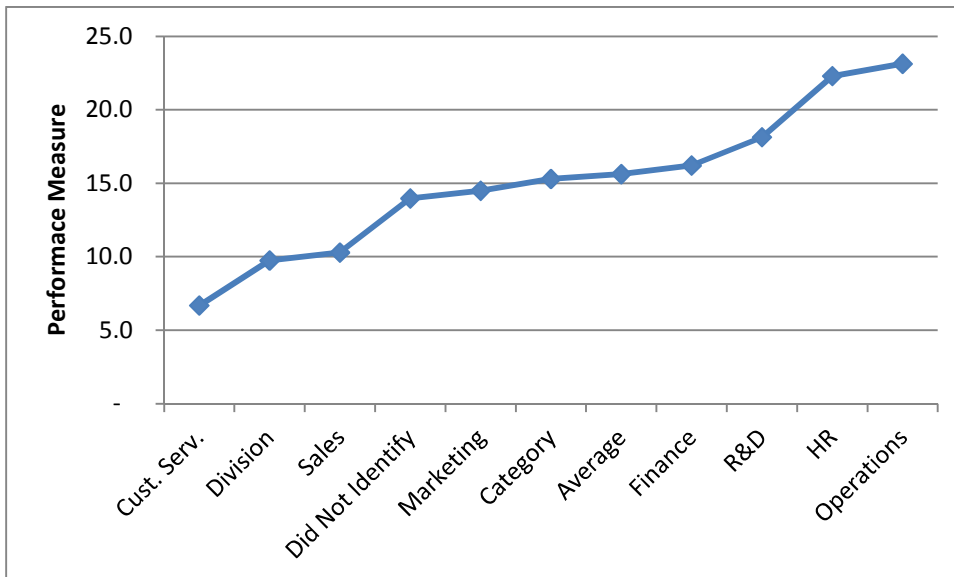
**Table 10**

**Organizational Context by Department**

Department	CA	
	Measure	CA Rating
Cust. Serv.	6.7	Low Performance
Division	9.8	Burnout
Sales	10.3	Low Performance
Did Not Identify	14.0	Burnout
Marketing	14.5	Burnout
Category	15.3	Burnout
Finance	16.2	Burnout
R&D	18.1	Burnout
HR	22.3	Contextually Ambidexterous
Operations	23.1	Contextually Ambidexterous
Average	15.6	

**Figure 5**

**Organizational Context by Department**



Utilizing the survey, it was determined where departments fall within the contextual ambidexterity matrix. As is seen in Figures 4 and 5, as well as Table 10, both the Sales and

Customer Service departments rated very low in contextual ambidexterity, while Human Resources and Operations both rated high in the measures. In fact, the differences were stark and therefore perfectly situated for the next phase of the research project. For the purposes of discussion, the department identified as Division is purposely disregarded due to only one usable diagnostic survey response. All other departments, including those individuals that did not identify their departments, were clustered in the 'Burnout' quadrant. The results of the survey were ultimately utilized to identify departments from which the interview targets would be drawn. Please note that the first set of numbers parenthetically referenced in Figure 4 represent the number of interviews conducted from that department, the second set includes the interviewees who normally associate with that department. Based on these results, it became clear that the interview portion of data collection should focus on understanding the antecedents to contextual ambidexterity within the previously identified departments. Specifically, the interviews would focus on understanding the low performance context in both the Customer Service and Sales departments and the high performance context in both the Human Resources and Operations departments.

## **5.2 Interview Results**

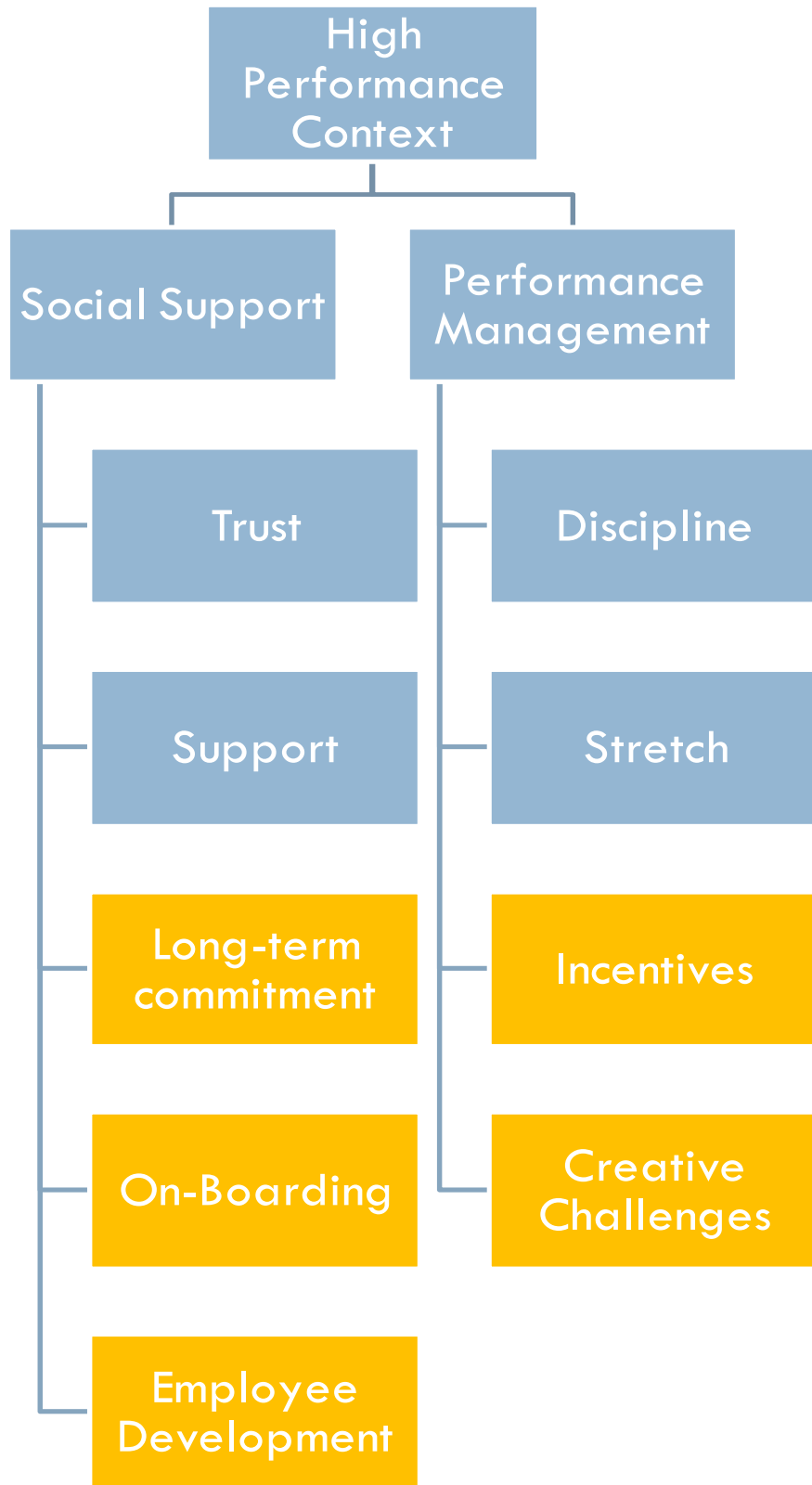
As described in the methodology chapter, a diagnostic survey was utilized to identify interview targets. As was determined in the diagnostic survey, a disparity existed between the level of performance found in the Operations, Sales, and Customer Service departments. Therefore, considerable effort was placed into understanding the antecedents to creating a high performance context and specifically the differences between these departments. Then, interviews were conducted of twenty one current and former employees; these interviews were then transcribed and coded. Further detail concerning the actual coding of the interviews, including the coding

statistics, can be found in the appendix. It was the diagnostic survey, interviews, participant observation, and archival data that forms the basis of the finding presented in this chapter.

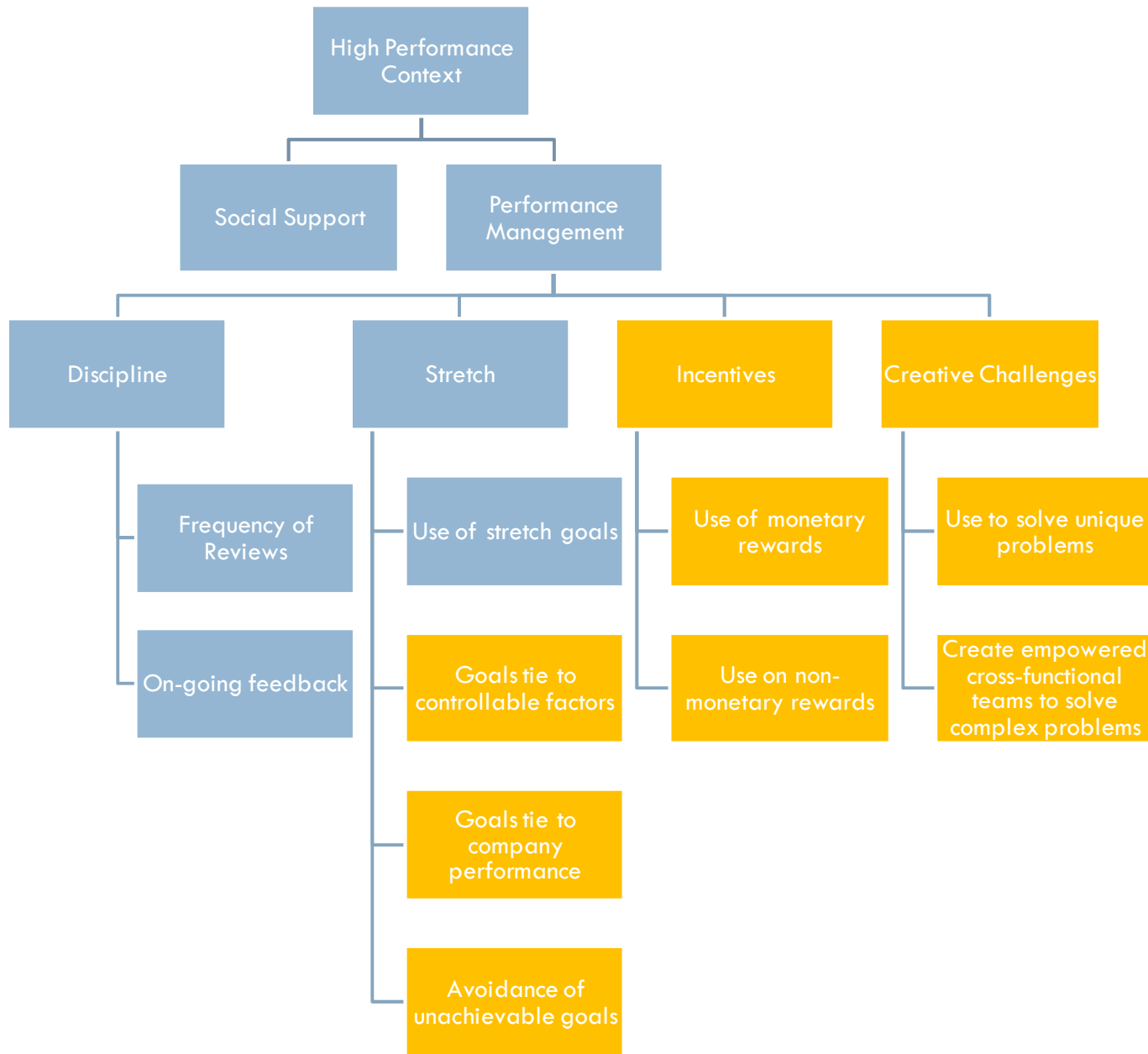
Through the interview data collection process, it was determined that the Sales department presents several differences from the Operations department. First, the Sales department is staffed by employees with a longer than average tenure within the company. During this tenure, the company has grown from a small, loosely run organization to a multi-billion dollar, tightly managed business. With this change, the Sales department lost control over the day to day decision making that impacted their job functions. For example, in the past, the Sales department could formulate product pricing without first gaining approval from other departments. This freedom also afforded the individual sales representatives great flexibility in their positions. Other similar decisions were left to the unilateral authority of the employees within the Sales department. However, with the growth of the organization, the Sales department no longer has the unilateral authority to set product pricing and instead must follow an authorization matrix prior to communicating pricing to customers. All of the interviewees, either employed in the Sales department, as well as those who frequently interface with the sales department, cited the pricing policy change as being detrimental to the ability of these employees to achieve both higher levels of performance management and social support. A deeper analysis of the additional analysis of the antecedents will be presented in the next sections. In addition, the similar factors that impact the Customer Service department will be examined. In order to place these negative organizational traits in the proper context, the organizational traits exhibited by both the Operations and Human Resources departments that address similar issues will also be presented.

In their article on the antecedents to organizational ambidexterity, Birkinshaw and Gibson (2004) identify four potential constructs to the phenomenon. Specifically, they list stretch, discipline, support, and trust as antecedents to ambidexterity. This research study found that all four constructs listed by Birkinshaw and Gibson were antecedents creating a high performance context and therefore will be explained in further detail in the sections that follow. In addition, this research found antecedents that are not easily categorized into their four constructs as well as overlap between the constructs. A full diagram illustrating the constructs and their antecedents uncovered in this research can be found in Figures 6, 7, and 8.

Figure 6

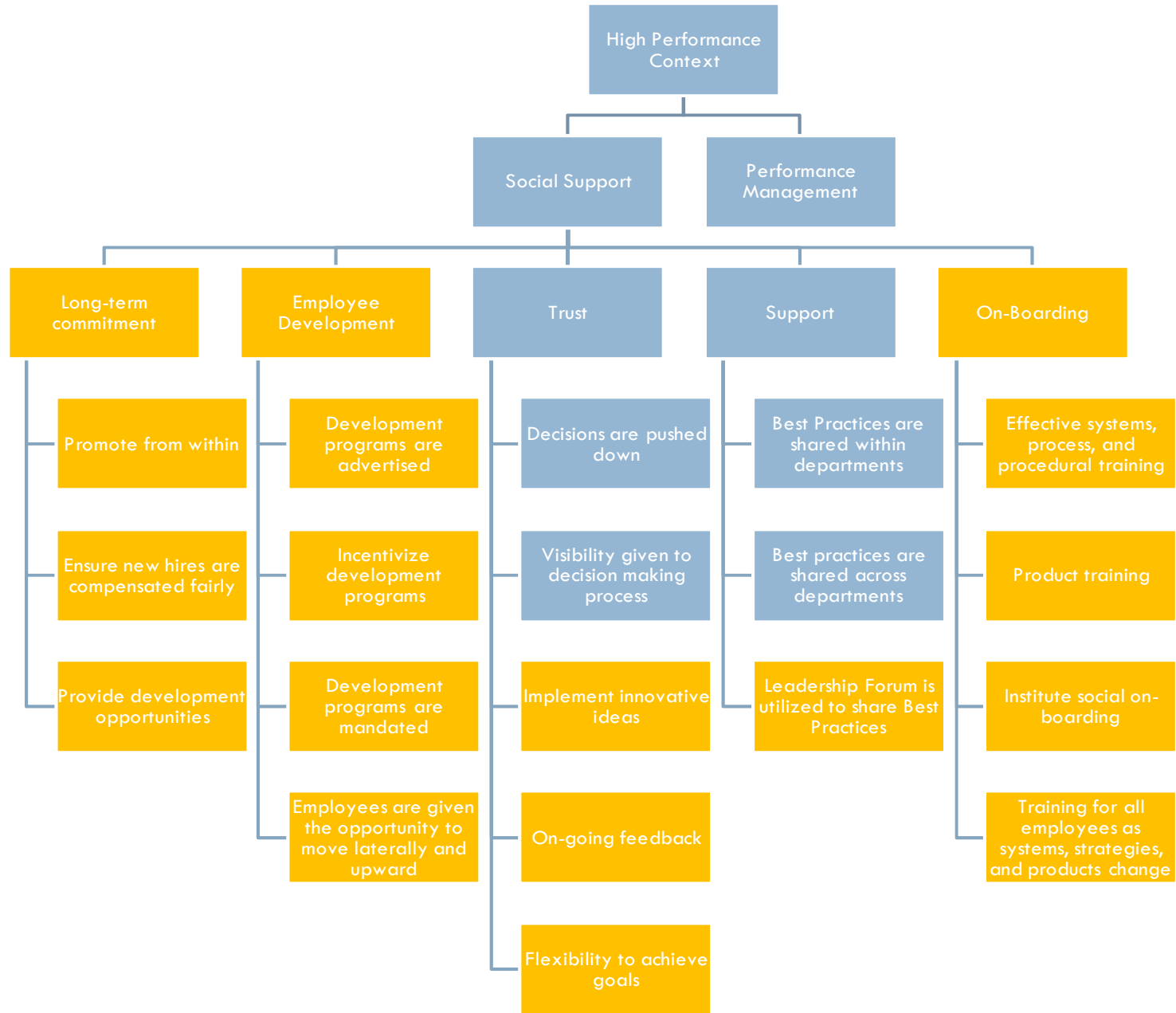


**Figure 7**





**Figure 8**



## 5.3 Performance Management

Within the performance management construct, it is important to understand what drives a department to rate themselves higher or lower than another department. Through the interview process, it became evident that the Operations department had several different cultural and management practices that enabled the department to rate higher in performance management. Specifically, these performance management practices can be subdivided into a few distinct areas, namely performance reviews, the utilization of reward systems, and the implementation of creative challenges. These practices are described in further detail in the sections that follow.

### 5.3.1 Performance Reviews

Birkinshaw and Gibson (2004) established the construct of “discipline” as an antecedent of creating a high performance context. Specifically, they define discipline as an attribute that:

induces members to voluntarily strive to meet all expectations generated by their explicit or implicit commitments. Establishment of clear standards or performance or behavior, a system of open, candid, and rapid feedback, and consistency in the application of sanctions contribute to the establishment of discipline.

Inherent in this explanation of discipline is the performance review process by which employees learn the opinion of management concerning their role performance.

Stark differences were found to exist concerning performance reviews between employees in the Sales and Customer Service departments and those in the Operations department. All of the sales people interviewed indicated that performance reviews were conducted annually. In addition, they indicated that regular feedback was not received from their supervisors or anyone else in the leadership of the organization. Similarly, employees in the Customer Service

department were subjected to reviews annually. Both groups indicated that the performance review process was approached as a required activity and also they viewed the process as having been completed simply because company policy required it to be done. In addition, both departments felt that the goals that were established within the process bore little relation to their day to day activities. Due primarily to this approach, performance reviews were not viewed as a value added activity and were not utilized to improve employee performance.

Conversely, employees in the Operations department had performance reviews conducted at least semi-annually and in some cases quarterly. Due partially to the increased frequency of performance reviews, employees tended to view the process as constructive and impacting their daily work practices. The department also tended to embed goals within the process that the specific employee could impact on a daily basis. As stated by one manager in the operations department:

I think supply chain is very, very metrics driven. It is all about delivering the numbers; it's all about delivering safety and quality and the financial performance. So, I think we have very strong ties to the metrics.

This factor also led to the performance review process being more impactful in the Operations department.

Nearly everyone interviewed mentioned that performance review goals and the company incentive program needs to be structured around factors controllable by the employee. While such factors were mentioned primarily in the Sales and Customer Service departments, it also was a point of concern within the Operations department. In 2012, the management incentive plan was tied primarily to overall company goals such as profitability and working capital. In

fact, a Customer Service employee pointedly asked the interviewer for the definition of ‘working capital’. When probed, this same associate stated that working capital had been a portion of their monetarily incentivized goals since they first started with the company several years prior. In addition, long tenured sales associates reminisced on how the sales incentives years ago were based on sales volume, a metric that was easily quantifiable by the line employee. Recently, the organization migrated to an incentive model that was based on gross margin, a calculation that the employee had no insight into how their daily activities impacted. Most employees could not relate their day to day activities to these goals, and therefore to their personal incentive plan. One interviewee noted:

There was an absolutely ludicrous budget that our incentive was based off of. It was unachievable, and set so that we were expected to achieve synergy savings from day one. So we unknowingly put in challenging and virtually impossible goals ...

Another person from a different department noted:

Departments don’t really have a clear definition of how what they do ties to company performance. But you need to have things that you work on on a daily basis tied to what is going on now, tied to how you get paid. That’s why I quit [redacted] department. There was no way to ... tie how you get paid to what I am doing here, you were beholden to what other groups were doing.

With a disconnect such as this, it becomes apparent that the performance incentives offered by the organization are not being utilized to drive the business forward. Within both the Sales and Customer Service departments no further goals were offered. However, in the Operations department, additional goals that were relatable to daily employee activities were offered, and

could be cited by most of the interviewees. Therefore, it becomes exceedingly apparent that in order for an employee and department to have performance management practices that drive towards contextual ambidexterity, the goals used to monetarily incentivize employees needs to be impactable by employees on a frequent basis. At the same time, these goals should be such that it drives the organization towards its overall mission. It is recognized that this last step is difficult, and will require input and approval from many different managers within the organization; but it is not impossible and is a necessary step in increasing the performance management practices of the organization.

While not a finding of this study, but a recommendation of a potential solution, a possible remedy exists in two steps. First, the company should attempt to breakdown the overall company goals into tasks that the employee can impact on a daily basis. For example, a customer service clerk may not understand working capital, but they can be educated as to how the payment terms offered a customer impacts accounts receivables, and therefore working capital. Within this, the customer service clerk can be given measurable sub-objectives to feed into the overall company objectives. Second, and very similarly, employee managers should create new objectives for their departments and employees that indirectly relate to the company's overall objectives; these should also be measurable and controllable by the individual employee. Of course, all of this starts at the top of the leadership ladder. The executives of the company must first define how their respective departments can impact the organization and then educate their direct reports. Working in unison, the department managers should then agree upon controllable objectives for the subordinates. Such a process would then cascade through the organization. While such an undertaking would be ambitious, it would only be so in its first

year. After that time, subsequent iterations would be less resource consuming while more impactful.

As previously explained, Birkinshaw and Gibson (2004) established the construct of “discipline” as an antecedent of ambidexterity. Within this construct, they establish that feedback needs to occur in an environment that is “open, candid, and rapid”.

In the organization studied, the aspect of open, candid, and rapid feedback was found to exist in both the Operations and Human Resources departments. In addition to the semiannual or quarterly performance review process, it was found that higher performing departments had an informal policy of regular, informal feedback sessions between managers and subordinates. One employee in these departments stated:

I always, on or about eight weeks, sit down with him [the manager] for an hour where we talk about the good, the bad, and the ugly so that when it comes to my midyear [review] and when it comes to yearend, nothing is a surprise and you know, I would love to see that trickle through the organization. Unfortunately, there are some managers out there that no matter how much direction, no matter how many tools you give them, they unfortunately never really see the value in giving feedback to their employees.

Another employee the same departments stated, “getting feedback from my boss is always constructive and we have informal conversations all through the year.” Neither the Sales nor the Customer Service departments had a practice of such feedback sessions. Within both the Operations and Human Resources departments, the sessions took the form of an informal conversation where the manager would assess the day to day performance of the subordinate. At the same time, the subordinate would offer feedback relating to the performance of the manager.

In fact, of all of the departments whose employees were interviewed, only the two that rated high in contextual ambidexterity had an informal practice of such feedback sessions. Within the departments that instituted this practice, the process of the formal performance review was less difficult and more constructive, as well as much less resource consuming, and prevented an employee from being surprised by their rating. In addition, regular feedback sessions allowed for corrections to employee practices before they became problems, or as succinctly termed by an operations employee “turning the wheel prior to the skid”.

Gibson and Birkinshaw (2004) consider “stretch” to be an antecedent of ambidexterity. In doing so, they define it as:

an attribute of context that induces members to voluntarily strive for more, rather than less, ambitious objectives. Establishment of a shared ambition, the development of a collective identity, and the ability to give personal meaning to the way in which individuals contribute to the overall purpose of an organization contribute to the establishment of stretch.

This proposition was confirmed by this study. During the interview process, no interviewee in either the Sales or the Customer Service could cite performance management goals that balance being achievable while at the same time causing the specific employee to have to work diligently to be achieved. On the contrary, more often than not, interviewees in the Operations department could cite specific examples of goals that, in order to be achieved required employees to reach beyond what had previously been accomplished. Such objectives aided in driving the department forward, served to drive performance management, and therefore were an antecedent to a high performance context. It is important to note that Birkinshaw and Gibson’s (2004)

research did not occur in a mature manufacturing organization, so this study provides the first confirmation that their premise holds true in the context of the organization studied.

An interesting aspect to the failure to provide adequate performance management metrics was mentioned by an employee within the Operations department. The long tenured employee mentioned that intra-departmental politics are more prevalent when people are not measured to a number and they are allowed to ‘sales pitch’ their actual performance. In other words, the establishment of quantifiable metrics has the added benefit of reducing corporate politics.

During the interview process, the majority of interviewees cited politics, especially that between departments, as being problematic. They described the phenomenon as presenting itself in the form of various departments utilizing it to divert resources and attention, as well as to drive the organization in directions that were not viewed as favorable. The leadership of the organization should be cognizant of this tactic and should attempt to realize when it is present. Interestingly, all of the interviewees within the Operations department were able to cite the metric they were measured against while the Sales and Customer Service departments were not. In addition, interviewees from multiple departments cited the Sales department as being the most political segment of the overall organization. For these reasons, the establishment of quantifiable goals has the dual benefit of increasing performance management and reducing interdepartmental politics.

Conversely, it was discovered during the interview process that departments that rated low in performance management had the common practice of setting goals that were commonly regarded as being unachievable. One interviewee noted that they “were regularly given ridiculous targets that were completely unachievable.” This practice was immediately recognized by the line employee and had the immediate effect of discounting the achievement of those



specific objectives. In addition, in those departments that instituted this practice, stretch goals were also discounted in a similar manner. Therefore, the instituting of unobtainable goals had the impact of causing all goals to be seen as unachievable and unreasonable. No interviewee in the Operations department could cite example of the publication of goals generally viewed as unachievable. Consequently, it is important that managers receive the buy in from employees concerning the achievability of performance management objectives.

The impact of performance management practices on theory is very obvious. First, the frequency of performance reviews is an apparent antecedent to the performance management component of a high performance context. In addition, the ensuring that the goals established for employees relates to both company performance and controllable factors is an antecedent of performance management. Finally, frequent, informal discussions between managers and employees are a significant antecedent to performance management.

For practitioners desiring to increase their performance management practices, it is clear that they should conduct performance reviews at least semiannually, if not quarterly. Next, they should ensure that the goals embedded in these performance reviews not only relate to the overall business objectives but also are impactable by the employee on a frequent basis.

However, the goals should encourage the employee to stretch themselves and should encourage performance at a higher level. In addition, the organization should ensure that employees receive regular feedback from managers concerning their daily performance. Such feedback should optimally occur on a bi-weekly basis and should take the form of an informal conversation.

Practitioners, at the same time, should be attentive to the role that internal politics plays in the performance review practice.

### 5.3.2 Incentive System

Within the construct of performance management exists the concept of the reward system utilized to incentivize behavior. This concept can be further broken down into two subcomponents, namely monetary and non-monetary incentives. During the research process, it became clear that there were differences between the departments that rated high in performance management and those that rated lower in the value placed on the incentive program offered by the company. It is important to note that the construct of an appropriate incentive system has not been addressed in the extant literature on contextual ambidexterity.

During the interview process, it became apparent that most interviewees viewed the monetary incentives offered by the company as being adequate, but only those that could relate their daily activities to their individual performance management goals were truly motivated by the monetary incentives. An employee in the Operations department emphasized this point by noting:

The need to drive results to be successful, and I don't want to say that the company—you always can say that it should come back to compensation, but our results are tied directly back to our compensation through the bonus plans and through our targets, but I really think it is about, within supply chain it is about [manager's name redacted] demanding that we get results and he follows up really well. I mean he is probably one of the better leaders that I have had that really sticks to a, you know, a performance review and semiannual reviews and quarterly updates. I mean it is making sure that you are staying on track. So, you don't want to fall behind so you work hard to stay on track and you work hard to deliver results. So, again, I think it is probably from a results perspective the more demanding environment that I have ever been in.

In addition, it is important to note that no interviewees mentioned that the monetary incentives were a specific de-motivator. The most frequent criticism about the monetary incentives was that it was hard to relate to their daily tasks, as addressed in a previous section. Therefore, when an employee could not relate their daily activities to the metrics utilized to determine the monetary incentive pay out, the monetary incentive lost its value and proved to be an expense to the company without any return. Additionally, a few interviewees thought the company relied too heavily on monetary versus nonmonetary incentives.

Several interviewees believed the company should offer a greater number and variety of non-monetary incentives to aid in increasing performance management. It is important to note that no interviewee, including those in the departments that rated high in performance management, thought that the organization adequately utilized these programs to incentivize employees. In addition, with no prompting from the interviewer, many believed that such offerings could improve employee and departmental performance. In fact, one interviewee listed no fewer than six different possibilities including meals during periods of high workloads, offsite meetings with supervisors, and well placed compliments that are communicated throughout the organization. Another person noted that in the past extra vacation time was earned when service anniversaries were achieved but that benefit had been eliminated creating a disincentive towards loyalty. A different employee stated that “what matters most are the little things like summer hours, jeans day, the Christmas party that we haven’t had for years.” A different respondent offered the following logical argument for non-monetary incentives:

When people are incentivized through money, it's easier for them to leave. Any other company can offer money. When they are incentivized through satisfaction, or

contribution, or a feeling of belonging, or other intangible, the decision to leave is much more difficult. Dollars only puts you in the game, intangibles win the game.

To carry this argument further, non-monetary incentives are more open to interpretation; people know how to equate the monetary incentives offered by one company to that offered by another. Taking another company's word that the culture is good is risk filled proposition, a risk that people may not be willing to assume. Therefore, by offering non-monetary incentives, turnover may decrease. Non-monetary incentives may be less expensive but more difficult to implement, harder to quantify, and more likely to fail. However, when done correctly, such incentives offer great benefits.

Therefore, all departments would benefit with the increasing use of non-monetary incentives to motivate performance and increase the measurement of the construct. In so doing, the company would be more able to increase its performance into a high performance context.

### **5.3.3 Creative Challenges**

The performance management construct is centered on the alignment of employees with the expectations of completing the tasks associated with their roles. Most of the time, the problems that an employee must address are typical in nature; however, some tasks are atypical and must be approached in unique ways. In these situations, it is necessary for the management of the organization to utilize creative challenges to solve problems. Within the target organization, a distinction between the Operations and Sales departments exists in the use of creative challenges as a problem solving technique. It is important to note that the construct utilizing creative challenges does not exist in the extant literature on contextual ambidexterity.

Within the Operations departments, ambiguous problems are presented to the staff where they are empowered to find and implement solutions. In these cases, management presents the problem, such as how to improve the efficiency within a department, and then gives those charged with finding and implementing a solution the space to do so. In fact, one interviewee commented when asked if their manager issued creative challenges:

Absolutely. Absolutely. I don't think it's a cultural thing, I think it depends on your boss. I think [my manager] is really good about [that], he is so creative and so high energy, he's always like let's do this and can you do that ... and so we end up doing things that are sort of outside of our normal routine.

This management technique was cited by all but one of the interviewees employed in the Operations department as not only being utilized, but also as being effective in finding and implementing solutions to complex and challenging problems. In addition, interview targets who were employed outside of the Operations department but who regularly interfaced with that department, such as Cost Accounting, noted the same techniques as not only being utilized but also being effective. Further, all of the interviewees within the department who noted the use of the technique also emphasized how it fostered more trust and job satisfaction since it allowed them to operate outside the bounds of their normal roles. Specifically, an employee in a department that rated high in contextual ambidexterity noted:

I think with members of the SMT that I have regular interaction with, that are kind of in my function, the perspective I get is 'hey I have really a great deal of confidence in the people that I have hired and you know you have basically here is the problem, you guys try to figure out the solution to it and not just like not bailing or passing the buck but I mean it is

like, ‘hey, I hired a group of people who are ... professionals and I expect that they can basically come up with a solution for it and that is encouraging and empowering.

It is important to note that in this regard, the use of creative challenges crosses over the performance management construct and demonstrated the adaptability normally associated with the social support component of the high performance context. Therefore, the utilization of creative challenges as a problem solving technique serves to demonstrate how performance management and social support are not unrelated aspects of the high performance context but instead are intermeshed. This overlap between the two concepts further reinforces the use of the reflective linear scale introduced in the previous survey section.

Conversely, interviewees employed in both the Sales and Customer Service departments stated that their managers did not use creative challenges as a problem solving technique. For example, one interviewee, when asked if the company utilized creative challenges noted, “I don’t think that they do that. I think that it is a very process driven organization and we kind of do things they way we’ve always done.” Another person went even further and stated:

If they were to issue a creative challenge, it would be something I would want to work on every day, but it’s not there. There’s no substance to what they challenge us to do.

Okay, you’ve got to drop your working capital; I don’t even know what that is.

As part of the interview process, the interviewer probed in attempt to ensure that the interviewees understood how such a technique would be employed and the probing left the interviewer satisfied that creative challenges were not a part of the management repertoire of these departments. It is important to note that the use of such challenges would be expected to be utilized less in a department such as Customer Service where the daily tasks of the staff are very

routine. However, it would seem that a department such as Sales, where the staff is in the field and faces an ever changing and unpredictable market landscape, such management techniques would be far more common. In fact, it would be expected that the Sales department would benefit more from the use of creative challenges than any other department in the organization.

From a practitioner perspective, the organization as a whole can utilize creative challenges to solve the unique problems it encounters on a regular basis. As an example, the company can create empowered cross-functional teams to solve complex problems. In utilizing this technique, the management of the organization should ensure that the team understands the problem and is given the tools to sufficiently address the issue. Then, leadership should step away and give the team the space to find a solution and the power to implement such a solution. In doing so, and as previously demonstrated, the company could not only address the frequent unique problems it faces but it could also aid employees in becoming more adaptable to changing market conditions. In addition, empowering employees in this way should also have the benefit of making employees more committed to the organization.

Within the performance management component of a high performance context, this study found that the performance review process, the incentives utilized to encourage behavior, and the use of creative challenges all serve as antecedents to the performance management construct. In addition, there are several subcomponent behaviors, all previously listed, that serve to support the antecedents. It is these subcomponents that organizations should work to embed in their culture in order to increase the performance management portion of a high performance context.

## 5.4 Social Support

Within the social support construct, it is important to understand why a department would rate themselves at a different level than another department. During the interview process, it became evident that the Operations department had several different cultural and management practices that enabled the department to rate higher in social support. In particular, these practices can be subdivided into a few distinct areas, namely a long term commitment, employee development, organizational trust, the sharing of best practices, and an effective employee on-boarding process. These practices, as well as their respective placement within the extant literature, are described in further detail in the sections that follow.

### 5.4.1 Trust

Embedded in the social support component of contextual ambidexterity is the construct of trust. When an employee trusts their manager and the leadership of the organization, they are more likely to take the risks normally necessary to be adaptable to changing business conditions. As mentioned earlier, trust is one of the four antecedents to contextual ambidexterity cited by Birkinshaw and Gibson (2004). Specifically, they describe trust as:

an attribute of context that induces members to rely on the commitments of each other.

Fairness and equity in a business unit's decision processes, involvement of individuals in decisions and activities affecting them, and staffing positions with people who possess and are seen to possess required capabilities contribute to the establishment of trust.

Within the context of the organization studied, it was found that there were differences between the Operations, Human Resources, Customer Service, and Sales departments in the specific attributes listed above. In addition, it was found that the sharing of ideas from the lower levels of



the organization upwards and the flexibility given to employees to achieve business goals are both attributes of trust and therefore are antecedents of social support and indicative of a high performance context.

Within the Operations department, nearly everyone interviewed noted that decisions are pushed down to the lowest appropriate level and then the decision makers are empowered to implement their decisions. In fact, one employee of the Operations department stated, “I can say we push decisions down within operations well.” Another Operations department employee, in response to a query regarding the practice of pushing decisions down to the lowest appropriate level stated, “in my plant experience we do, and in corporate policy, not so much ... over here [in Operations] I think ... we do.” Such decisions can range from the mundane to the complex, as previously noted in the creative challenges construct. It is important to note that this pushing of decisions down in the Operations department only extends to decisions where that department has complete control over the decision making process and the power to implement the decision. An example of such a decision would be the equipment maintenance schedule within a facility. A different situation would exist in cases where the decision impacts other departments, such as the specific location to manufacture particular products, where employees within the Operations department would not have the authority to make such decisions. A similar situation exists in the Human Resources department where it was noted that the department leader tells his direct reports that they can decide whether to use a vendor or not, despite their lack of comfort with the magnitude of the decision.

A different situation was found in every other department interviewed, including both the Sales and Customer Service departments. In fact, more than one Sales department employee mentioned that a sales representative must gain corporate approval before selling an existing

product to a new customer at an existing price. Additionally, an interviewee in the Finance department, who regularly interacts with the Sales department, noted, the company has an informal policy of pushing decisions down to the lowest appropriate level until a single party disagrees, stating that,

the decision goes down and then someone hears about it and raises a flag and then it gets brought up again. You're empowered to implement, but you are not empowered to be second guessed."

A mid-level manager noted,

So in a lot of cases the things that I wish we could push down but we don't just because it is less time consuming for us to just do it ourselves even though the answer is probably going to be better coming from [lower levels]."

In those cases, the decision is typically pushed up to an executive who has both the authority to decide and the power to implement the decision. In so doing, the organization negatively impacts the trust construct of social support in several ways. First, it undermines the trust that employees place in the decisions made by organization leaders. Next, since decisions are pushed down until someone, usually from a different department disagrees, the company inadvertently contributes to interdepartmental friction as well as departmental politics. As an interesting sidebar, and tangible proof that this departmental friction exists, when the two codes of "Departmental Friction" and "Siloed Departments" are combined, the construct represents the fourth most common construct falling just behind "Goals do not relate to individual performance". In addition, the company ensures that decisions are made in an extremely inefficient and ineffective manner.

From a practitioner perspective, the authority to decide and the power to implement should be pushed down to the lowest appropriate level. However, before such a policy can be implemented company wide, the organization must first conduct a comprehensive study of deciding which individuals can make specific decisions, who they must seek input from in order to decide, and also give those persons the power to implement the decision. Embedded in this process, the leadership of the organization must also determine when a decision should be escalated, for example if the risk exposure exceeds a certain threshold. Finally, and most importantly, the leadership should abide by the process.

As inferred by Birkinshaw and Gibson (2004), trust is also demonstrated by giving visibility within the decision making process. Interviewees in the Operations and Human Resources departments noted that interdepartmental decisions were typically made in the most visible manner possible depending on the type of decision being made. They, along with nearly every interviewee regardless of department, also realize that not all decisions, with personnel decisions being the obvious example, can be transparent. Outside of these two high performing departments, interviewees noted that little transparency was given to the decision making process. In fact, one interviewee from the Sales department referred to decisions made by the executive staff as emerging from a

black hole ... where things kind of go in and they come out. Whereas I have been in businesses where when those decisions and those things are being talked about, people on the leadership forum level, at the VP level and manager level, are actually brought in to be informed of or participate in those types of discussions. We don't do that here. I mean, SMT [upper level executives] kind of goes up in their little hole every Monday and there is not a lot of engagement with the rest of the business.

The construct of trust is also dependent on the antecedent of the sharing and implementation of innovative ideas. Most interviewees, regardless of department could cite that they had shared their innovative ideas, but only those present in the Operations department could point to examples of where the ideas were put into practice. Specifically, an employee of that department stated:

The whole [redacted] idea was something that I found in research and it was seeing in the marketplace and saying we really need to do something, this would be a fairly simple thing, talked to some of key people, this would be a simple thing for us to do and then it was like we were trying—we were working on a number of product initiatives at the time, it is like our plate is really full, we can't do anything and then all of a sudden next thing I know [redacted] is born.

It is recognized that certain departments, such as Finance, are discouraged from innovation due to the legal implications of becoming too creative, but other departments, such as Sales and Marketing should be in the forefront of innovation for the organization. When a leader chooses to implement an idea submitted by an employee, that leader takes a step towards gaining the trust of the subordinate. In addition, the implementation of the idea helps to build a sense of a long term commitment from the company towards the employee. Further, the implementation of the idea should help the employee sense their worth within the organization. As demonstrated through the interview process, the difference between the Operations and Sales departments on the implementation of innovative ideas is an antecedent to trust.

As mentioned in the previous performance review construct, the practice of on-going feedback is an antecedent to performance management. In addition, on-going performance feedback leads to

more managerial trust and therefore is also an antecedent to social support. All employees who mentioned that they were the recipients of on-going feedback held more favorable opinions of the process, even if the review brought something to light that was not exactly complementary of their work performance. An employee in one of the contextually ambidextrous departments stated that the practice of on-going feedback should

be automatic. My manager asks, “What do we need to continue to work on?” We talk about what I am doing really well here but if you want to get to that next step, this is what I would like to see you focus on and to stretch yourself; I also think you need to work on this and this...

In essence, the employees who received on-going feedback felt that the process was personally advantageous to them since when receiving the feedback they were given the opportunity to correct the issue prior to the behavior being placed in their ‘permanent record’. During the interviews, they also mentioned that such feedback caused them to trust their managers more. It is important to note, and as mentioned in the prior section, this practice was nearly universal among interviewees employed in the Operations and Human Resources departments, but it was not found in other areas. Therefore, on-going feedback is an antecedent to both trust, and thereby social support, and also performance management. As such, it also serves to demonstrate that social support and performance management are not independent of one another, but are intermeshed, as previously demonstrated.

An additional antecedent of the trust construct uncovered by this research is that of giving employees the flexibility to decide how to achieve pre-established goals. Interviewees in the Operations department expressed that they had more latitude in deciding how to achieve their

goals and also mentioned how their managers and leaders usually supported the paths they chose to take to achieve these goals. As an example, an employee of that department noted, “I haven’t had an issue where something was decided for me that I can think of. I think I am allowed to make the decisions that are necessary.” The flexibility given to employees within the Operations department was noted by those outside of that department. For example, an employee of a low performing department noted:

He [the Operations leader] gives them the flexibility to do it. If that is talking directly to your utilities company and deferring your water bills for a year, whatever it is, or doing something outside the box, he will totally support you. I think he will, well I know he will, support you even if you are not necessarily successful, but if he knows that you truly have your plant and the people, he also pushed safety, obviously. But as long as he knows that you are totally doing everything within the expectations of what he wants that person to do in that position, you know that he will support you. And I think that is the difference between ops and [department name redacted] ... Operations ... you truly have the authority and responsibility and you have the control to make that plant run reasonably well.

In addition, when probed, all of the interviewees that mentioned this goal obtainment flexibility also stated that the flexibility and support received from their respective managers led to an increase in the trust they had for the managers. Outside of the Operations department, few interviewees mentioned that they were given flexibility in deciding how to achieve their performance goals. Similar to the on-going feedback antecedent, the goal obtainment flexibility antecedent encompasses both social support and performance management and serves to further demonstrate that social support and performance are not completely independent.

As the examples listed above show, the construct of trust is dependent on the antecedents listed by Birkinshaw and Gibson (2004) as well as the implementation of innovative ideas and giving the flexibility to achieve goals. When these antecedents are present, employees are more likely to trust their managers and the corporate leaders, and departments are more likely to perform at a high level, as is seen in the Operations and Human Resources departments. When these antecedents are not present, or are found to be weak, such as in the Sales and Customer Service departments, social support is low and consequently a high performance context is not present.

For practitioners the implications of employee trust should not be underestimated. With the understanding that not all decisions can be transparent nor anticipated, the organization should strive to add more transparency to the decision making process. When transparency is not possible, the company should make a concerted effort to explain the decision and the process that led to the decision after the fact. As previously mentioned, managers should have frequent, informal discussions with their staff concerning day to day performance. Finally, the organization can increase trust by demonstrating that it values ideas not just by listening, but also by implementing. These strategies will add to trust, both managerial and leadership, and should therefore lead to employees being more adaptable to changing market conditions.

During the interview process, nearly every interviewee noted that there was either a deficiency of manager or of leadership trust. As such, and since the social support construct relies trust as a foundational antecedent towards becoming adaptable, it is suspected that the level of trust within the organization moderates the impact of the other antecedents of social support. In retrospect, it would have been helpful to have designed the diagnostic survey in a manner that would have explored the potential moderating effects of trust on the other antecedents of social support.

At this point it is necessary to explore an interesting finding concerning trust. During the interview process, multiple invitations for interviews were sent to potential targets employed in the pre-specified departments. Of the twenty-two invitations sent, only one was refused, and that refusal was from an employee in the Customer Service department, the lowest self-rated department on the social support scale. In addition, and as seen in Table 11, those departments that rated themselves the lowest in social support also had the shortest average interview times. Conversely, the departments that rated themselves higher had longer than average interview times. It is important to note that all of the interviews, regardless of interviewee or their department, followed the same interview protocol. This finding is even more interesting considering the preconceived notion that the researcher expected interviewees from the Sales department to be more talkative considering the nature of their profession. Therefore, it may be possible to measure the trust between departments by measuring how open and verbose interviewees are during an interview.

**Table 11**

<b>Department</b>	<b>Average Interview Length</b>	<b>Social Support Measure</b>
Customer Service	34.3	2.8
Sales	38.0	2.9
Operations	46.5	4.7
Finance	49.3	3.8
Marketing	50.3	3.3
HR	55.0	4.7
Overall Average	45.2	3.7



### **5.4.2 Long Term Commitment**

The social support construct is dependent on employees believing that they have the freedom to be flexible in their jobs so that they can become more adaptable to changing conditions.

According to Birkinshaw and Gibson (2004), social support (a combination of support and trust), is concerned with providing people with the security and latitude they need to perform.

One manner that an organization can validate that it values such a trait in its employees is by establishing that it values a long term commitment. When employees believe that the company desires to maintain a long term employment relationship, the staff will be more likely to explore behaviors demonstrating flexibility in approaching their roles. While it would seem that the long term commitment construct would be embedded in Birkinshaw and Gibson's (2004) trust antecedent, it does not fit with the definition they provided for the construct. Therefore, it is important to note that the construct of a long term commitment to employees does not exist in the extant literature on contextual ambidexterity.

Through the interview process, it became apparent that no interview target, regardless of department felt that the organization truly valued a long term commitment from its employees. In fact, the most cited example of the value the company places on a long term commitment centered on the announcement of service anniversaries. However, this is a very misleading indicator of the value placed on a long term commitment. Such announcements serve not to help people stay employed with the organization longer, but merely points out who has managed such a feat.

An interview target employed in the Finance department noted that the internal labor market was inefficient as demonstrated by the company preferring to hire outsiders instead of promoting

from within. A different interviewee in the Finance department noted that these same trends become more prevalent with the mid-level and upper level management positions in the organization. The same interviewee also noted that an outsider hired into a similar role presently occupied by a long term employee will start at a higher salary than those who have been with the organization for more than a few of years; this even held true when the years of experience of the employees was controlled for. The employee expanded the comment and stated:

So you get to a point where I either have to be promoted, which we don't do. I mean just to catch up with newly hired employees ... But within the natural flow of it, that is what doesn't make sense, we continue to hire above where existing people who have been here for years and years and years are, it is just kind of a disincentive.

Through these two practices associated with internal labor market inefficiencies, the company tangibly demonstrates that it does not value a long term commitment from its employees. A different employee offered a very telling assessment when asked: How does the company show it values a long-term commitment from its employees?

Pffft. Zero. Zero. I don't see any. I don't see any programs that values, that says 'hey, okay, if you start with us; we want to kind of bring you through and reward you and get you to go with the company. I also don't see any commitment to keep you on short term. No short term commitment, either.

When interviewees employed in the Operations department were first asked how the company demonstrated that it valued a long term commitment from its employees, they too cited the announcement of service anniversaries. However, when probed, those same employees easily pointed out certain behaviors, such as promoting employees and giving them developmental

opportunities, which demonstrate a long term commitment to those staff members. Specifically, an employee from the operations department stated:

It is about keeping people around the business. I think just the fact that we have developmental plans in place to encourage people to get better and to move through the organization and ready themselves for promotion that in itself tells people we want them to be around. We are not just going to turn through people. We want to develop that base of expertise and so I think the fact that ... outside of compensation, that's how you keep people around; how do you make them develop the pride in the organization and want to be part of the organization is you try to develop them and engage them in areas outside of where they are currently ...

In fact, of the six interviewees from the Operations department, five had been promoted during their tenure at the company and only one was hired into their current position. To compare, of the fifteen interviewees who were not employed in the Operations department, only one had been promoted, one had moved laterally, three had been demoted, and ten were hired into their current positions. This stark difference is even more telling when it is known that the average tenure between the interview targets inside the operations department and those outside the department was approximately the same.

Therefore, given these considerations, it becomes apparent that the value the organization places on a long term commitment from employees is an antecedent to social support. As such, this antecedent is a finding unique to this study and should from this point forward be added to the definition of trust developed by Birkinshaw and Gibson (2004).

From a practitioner perspective, organizations need to develop programs that encourage employees to want to reach that goal of a long tenure, instead of merely pointing out when such milestones are achieved. In addition, organizations need to work to make internal labor markets more efficient by promoting from within and working to develop employees for the next level up. Further, organizations need to carefully monitor pay rates to ensure equitable payment within similar positions and levels of experience. The failure to do so simply incentivizes current employees to turnover in order to make a market rate and also demonstrates that the company does not value a long term commitment.

### **5.4.3 Employee Development**

The employee development construct of social support exists in parallel to the long term commitment construct. As mentioned in the previous section, the organization can demonstrate that it values a long term commitment to its employees by investing time and other resources into their development. In addition, when the organization works to develop the employees, it provides them with the tools necessary to be adaptable to changing conditions and therefore fosters the social support component of a high performance context. It is important to note that the construct of employee development does not exist in the extant literature on contextual ambidexterity.

In addition, the antecedent of employee development is similar to long term commitment in that it would superficially seem to be aligned with Birkinshaw and Gibson's (2004) construct of trust, but it does not actually align with the definition they provided. Consequently, this antecedent is also an addition to the literature on the high performance context necessary for contextual ambidexterity.

During the interview phase of the project, it became clear that the company offered employee development programs. However, as one interviewee outside of the Operations department pointed out, these programs are purposely not advertised to the general population and instead the organization requires employees to specifically request development. Not surprisingly, given this revelation, employees in both the Sales and Customer Service departments were unaware that the company offered development programs. One interviewee noted that he was unaware the company offered development programs stating that if he wants to develop and move up, he would have to leave the organization. Specifically, he stated:

It's just not the company's position to do that. But I think what the company's position is [that] you come in and remain in your current position ... if I want to get to the next level; I am going to have to leave the company ... because there is no framework for that. I think a lot of people get frustrated with the company in that it is easier to bring in a temp or to hire from the outside instead of grooming a person for a position.

Within the Operations department, the strategy was much different. First, that department was the only one within the company where interviewees knew of, and participated in, an internal mentoring program. In addition, a senior level manager in the Operation department noted that high potential employees are identified and the department then invests time and resources into developing that person for the next step in their career path. One such development strategy cited was allowing the employee the flexibility to work outside of the department, on a special project for example, in order to develop a specific skill or to learn how a different department operates. The fact that the Operations department worked to develop its employees was noted by an employee outside of the department who stated:

There is a lot of compartmentalization. You know, QA [Quality Assurance, a sub-department within Operations] does programs within QA ... There are tools available within Human Resources, but people don't know that they are out there as a resource. And nobody knows who is the right person to ask.

The Operations department viewed employee development programs as a necessary step in order to prepare for a higher role within the department. Overall, it became clear in the interviews that the Operations department differed greatly from both Sales and Customer Service by investing in employee development.

From a practitioner perspective, it is clear that the entire organization should implement employee development programs. An interviewee suggested that participation in such programs should be incentivized through both monetary and nonmonetary means in order to show that the organization is truly committed to developing its employees. Also, such programs, contrary to the current practice of the target organization, should be advertised. While the reason that the organization purposely chose not to advertise its programs remains unclear, what is clear is that having programs that most employees are unaware of is non-productive. For the company to truly and fully benefit from these programs, all employees should be aware of their existence.

In addition, several interviewees suggested that development programs should be mandated.

When probed, an interviewee in the Finance department provided the argument that:

When such programs are optional, only a few will choose to participate and the benefit to the department and the company will be less. But, mandating support programs, the benefits will be greater.

In order to conserve resources, the actual program mandated to specific employees should vary by level within the company. Additionally, specific programs should be tailored to the audience; for example, Customer Service employees should have programs that will either directly benefit their current positions, or the next level in their career path, and managers should have leadership training.

One final step in the employee development process is that employees should be given the opportunity to move laterally as well as upwardly. The lateral move is rarely utilized in the organization, and was only seen in Marketing and Operations, but is an impressive step in preparing the individual employee for a larger role. Such a purposeful move is also noticed by other employees and demonstrates that the organization is investing its time and resources in preparing employees for their next career steps. In addition, a lateral move serves the organization further by allowing an employee to leverage their preexisting organization knowledge into the new role; a new hire, in this regard, would be much more one dimensional.

Therefore, given these considerations, it becomes evident that employee development provided by the organization to employees is an antecedent to social support. As such, and similar to the long term commitment antecedent, this antecedent is a finding unique to this study and should from this point forward be added to the definition of trust developed by Birkinshaw and Gibson (2004).

#### **5.4.4 Best Practices**

Within the social support component of a high performance context exists the construct of the sharing of best practices. The formal processes employed by the organization to aid departments to share such practices internally, and also between departments, assist individual employees and

departments in becoming more adaptable to the changing market environment. Within the target organization there exist perceptible differences between the Operations and Sales departments in the sharing of best practices. It is important to note that the construct of the sharing of best practices is not directly addressed in the extant literature on contextual ambidexterity. However, this concept is indirectly related to the “support” antecedent addressed by Birkinshaw and Gibson (2004) where they describe it as inducing:

members to lend assistance and countenance to others. Mechanisms that allow actors to access the resources available to other actors, freedom of initiative at lower levels, and senior functionaries giving priority to providing guidance and help rather than to exercising authority contribute to the establishment of stretch.

Within the Operations department, all interviewees could cite examples of how the organization shared best practices. For example, employees physically located in a manufacturing facility noted how the management of the facility would meet on a daily basis to discuss the problems facing the site. In these sessions, a discussion would take place on how each department was addressing their portion of the issue and then other departments could adapt the solution to their particular area. Likewise, Operations employees physically located at the company’s headquarters noted how the leadership from the company’s twelve plants in all regions of the country would meet at least twice monthly, usually via a telephone conference, to have similar discussions. A manager within the operations department when asked about the sharing of best practices, noted:

We try to drive them across all plants. So, if one plant is doing something that we think is a best practice, we’ll drive that and basically push it across all twelve plants. I think



the other way is we have weekly conference calls. So ... all twelve plant managers and all functional groups [are] on a conference call once a week and the whole idea behind that is 'what don't we do very well?' ... With the whole idea behind the conference call is for people to talk about what they are doing well and where they have a best practice.

During these calls, the Operations leadership would facilitate the discussion addressing issues such as manufacturing safety and the plant leadership would share their best practices that addressed the issue. Similar regular discussions would address other varied issues such as human resource management, production planning strategies, and equipment maintenance scheduling. Overall, all interviewees in the Operations department credited the leadership in the department with facilitating this practice and were aware that such best practice sharing did not occur in other departments. As such, it is obvious that the leadership of the Operations department has made an intentional effort to embed the sharing of best practices within the culture of that department.

Conversely, none of the interviewees embedded in either the Sales or Customer Service departments could cite specific best practices shared within those departments. In fact, one of the interviewees who regularly interfaces with the Sales department stated, "I don't know if we do, so much. I don't know if we're effectively organized [in] a way to manage knowledge in the company that way." It is believed that the fractured structure of the Sales department may be a hindrance to the sharing of best practices. This point was reiterated by a manager within the sales department who, when asked about the sharing of best practices stated, "I think that is something lacking right now. I think, for example, within our categories I don't think we are always sharing best practices." In addition, during the interview process, more than one interviewee in the Sales department noted that the geographic spread of the department may be directly related to the

failure to share best practices. However, this spread is no different than the challenge faced by the Operations department, a challenge, which as previously noted, they have managed to overcome. The failure of the Customer Service department to address best practices is less daunting since they are all based on the company's U.S. campus but yet best practices are not shared.

Among the interviewees who could cite the best practices shared within their departments, none could note examples of the sharing of practices outside of the confines of their respective departments. While it is recognized that some practices are department specific, others can be utilized directly or refined slightly and then instituted across the company. Practices such as improving corporate safety or more efficient hiring procedures are easily sharable, but doing so requires communication, as well as an established method for the practices to migrate across departmental boundaries. One interviewee offered a solution that, if implemented, would allow for the better sharing of best practices. Specifically,

But I think [there] is a real opportunity frames for improvement. I think, informally it happens ... on a conversational basis ... or when somebody asks somebody for 'Hey, I could really use some perspective on this',,, I think it is willingly reciprocated or willingly offered after it has been asked for. Less often, do people go 'Hey this really great thing happened and I want to make sure you guys know about it.' This could begin to happen as part of the leadership forum.

Another interviewee, from a different department echoed the sentiment by stating: "I think the leadership forum would be a good venue."

From the perspective of the social support component of a high performance context, the sharing of best practices increases the latitude that individual employees and departments have in being more adaptable to changing market conditions. In addition, and similar to the employee development construct, the sharing of best practices also would serve to increase performance management in that when employees and departments utilize more efficient methods to accomplish their daily tasks, methods that are learned from other individuals and departments, they will become more aligned within their current roles. Therefore, the construct of the sharing of best practices serves to demonstrate the intermeshing of social support and performance management.

From a practitioner perspective, the methods of sharing best practices should be institutionalized in the organization. Within the environment studied, the existing Leadership Forum would be the optimum vehicle for such communication. Specifically, the forum could be modified from its present inefficient form to that where the discovery, sharing, and then implementation of best practices is institutionalized. In addition, and in order to make such institutionalization routine, the forum should meet on a regular basis with a defined, pre-distributed agenda, and track and follow-up on practices previously instituted.

#### **5.4.5 On-Boarding**

Both the social support and performance management components of contextual ambidexterity are also built upon the proper on-boarding of employees. Specifically, on-boarding can be broken down into two sub-components, namely performance on-boarding and social on-boarding; both will be explored in this section. Remembering that contextual ambidexterity is built upon employees being both aligned and adaptable, and that the alignment relates to performance management and the adaptability relates to social support, it is easily seen that

before these events can occur the employ must first understand their respective role within the organization. Their understanding of this role begins when they interview for the job and continues as they are brought into the organization; this process is commonly referred to as on-boarding.

The employee's understanding of their specific job function begins during the job interview process and continues through their first few weeks of employment. During this time, in an optimum environment, it should become clear to the employee not only the specific role they are to perform, but they should also receive the necessary training to perform at a high level. This training should come in the form of technological training for the specific IT systems, as well as process and procedural training. Only when an employee understands these areas are they truly capable of being aligned in their role.

During the interview process, it was determined that no department in the target organization believed that the company was adequately supporting performance on-boarding. In fact, the interviewee from the Human Resources department provided an extended explanation describing how this had long been recognized as a weakness in the organization. One employee described the manner the company on-boarded new employees as "throwing them in the fire." Another employee, from a different department described the on-boarding process as "there is not a lot of standardized training. We have a tendency, I have seen, to dump a lot of people into jobs and let them sink or swim." Other interviewees describe the only effective portion of the on-boarding process as that related to the completion of mandatory government paperwork, the description of company offered employment benefits, and the explanation of company human resource related rules and policies. Beyond that, all felt that performance related on-boarding was non-existent as employees were expected to learn on the job, in what a few described as a "baptism of fire". In

addition, most lamented that the company, outside of the manufacturing environment, had no standard operating procedures that could be utilized for training purposes. Also, many noted that there were no systems training despite the company operating with a very unique ERP system, that none of the interviewees had utilized outside of the target organization.

However, an employee in the Operations department did offer a solution:

To be effective, the company must change. How else will a new employee understand the philosophies and culture of a company that they are going to work for? You are going to spend more waking hours at work than you do at home, and if you want to get true value out of somebody you have to invest and invest means okay, supply chain is very large and encompasses engineering, logistics, customer service, you have to have a feel and a touch. You got to touch each of those areas in order to fully understand. And it is going to help you understand what you can contribute in your job.

The same employee later expanded:

For example, in sales, I said this from day one, if you are a salesperson, you need to work in a plant for at least two or three weeks. You need to work with the scheduler for a week, an expediter for a week, so that when you call the plants ... you understand that we don't just push a button and here is your product ... That is what the on-boarding process should entail.

Another employee, from a different department stated:

There is not as much documentation around processes and what we should be doing. It would be nice to have some sort of starting point so that when someone walks in the

door, they sit down, and they have the processes outline for them. Right now, there are not a lot of good starting points where he can just read this is what I need to be doing on this. Instead, he has to figure it out on his own and there is probably a lot of figuring out ... which means that person to person we have ... inconsistent practices.

In addition to the lack of training related directly to the systems, process, and procedures, the interview process revealed that employees in the Sales department, as part of their on-boarding process were not informed of the products the company manufactured. As such, they were expected to sell products they did not know existed. In addition, employees in the Customer Service department are not provided with adequate systems nor product related training. Furthermore, the performance management related on-boarding is also related to training and informing current employees when something changes, such as new compensation plans or product strategy. Similar to the lack of training for new employees, during the interview process it was revealed that no interviewee thought the organization performed this task well. It is important to reiterate that these performance on-boarding inadequacies were found in every department, including Operations and Human Resources, and therefore impacted the entire organization. These on-boarding deficiencies, proved to be detrimental to the performance management rating in the diagnostic survey and therefore the performance management component of creating a high performance context.

Through the interview process, a new concept emerged, that of social on-boarding. While the previously described job performance related on-boarding is generally thought of as the classic definition of employee training and on-boarding, it is important that the new employee become acclimated with their peers, subordinates, and leaders when they begin in their new role. Similar to the performance on-boarding, the practice of social on-boarding begins during the job

interview process when the applicant first meets their manager and continues through the first few weeks of employment as the new employee becomes situated in their new role. As this occurs, the employee begins to build social networks, both formal and informal, and commences to learn how much flexibility they will be given to adapt to changing market conditions.

Within the organization of interest, and as uncovered during the interview process, only the Operations department efficiently addresses social on-boarding. As mentioned by several interviewees, this department routinely schedules one-on-one sessions between new hires, peers, managers, and others with whom the new employee may have contact. In addition, a specific U.S. manufacturing facility customarily invites the new employee to a social hour after work with the facility leadership. To clarify, an employee in the Operations department stated that when a new employee begins to work in a specific plant:

We'll go to [redacted, a local restaurant]. I know that happens in other departments.

Bringing them into the social aspect of it immediately is a good way to on-board, in my opinion. But in other departments, I didn't even know who was working there. Just the simple act of walking someone around the buildings and introducing them to everyone is very helpful.

By taking these steps, the new employee is informally encouraged to develop the social networks that will allow them to become more adaptable to changing conditions. Interviewees from other departments noted that extroverted new employees from departments other than Operations routinely were self-motivated to conduct these types of social on-boarding activities, but only the Operations department had institutionalized the practice. In so doing, this department ensured

that all employees were afforded the opportunity for this type of on-boarding, regardless of their personality.

For theory of contextual ambidexterity, the concepts of both performance and social on-boarding relate to Birkinshaw and Gibson's (2004) support construct. In addition, both types of on-boarding demonstrate to employees that they are valued and aids them in becoming both aligned with their new roles and adapted to changing market conditions. Therefore, on-boarding serves as an antecedent to both social support and performance management. Similar to the sharing of best practices and the employee development antecedents, the on-boarding antecedent provides further proof that social support and performance management are intermeshed in their relationship to creating a high performance context.

For practitioners, it is vitally important that both performance management and social on-boarding practices be firmly established within the culture of the organization. Therefore, the company should ensure that proper systems, process, procedure, and product training occur in the first few weeks of employment. This training should be adapted to the specific role and level that the employee is hired or transferred into; for example, a salesperson would need more training in company products than would an accountant, but the accountant would need more training in corporate governance. In addition, the entire organization should adopt the social on-boarding practices of the Operations department, namely scheduling the one-on-one meetings with relevant parties and instituting the informal after hours get-togethers. Also, in regards to both performance and social on-boarding, the company should adopt similar practices for existing employees when systems, policies, and leadership changes, such as the announcement and implementation of new product strategies.



Within the social support component of creating a high performance context, this study found that the a long term commitment of the company towards employees, trust that employees give to the leadership of the organization, the development of employees, the sharing of best practices within and between departments, and the on-boarding of new employees all serve as antecedents to the construct. It is these subcomponents that organizations should work to embed in their culture in order to increase the social support portion of creating a high performance context. In addition, there are several subcomponent behaviors, all previously listed, that serve to support the antecedents. Further, the study also found that the sharing of best practices, employee development, and on-boarding are all antecedents to both social support and performance management.

## **5.5 Moderating Factors**

In addition to the previously discussed impact of trust as a moderator of the other social support constructs, an additional moderating factor was uncovered by the research. Specifically, during the interview process, it became apparent that there were stark differences between the management philosophies and practices within the different departments and between departments. In fact, the differences between managers within departments and the differences between departmental practices was the most common code found in the interview process. To be exact, all interviewees noted differences between departments and managers. Further, most interviewees, when asked, could identify which managers and departments were doing well and which were not. This point was emphasized by an employee of the Operations department who stated:

I would say that I describe my work experience as being a great one a lot because of my boss. You know they say people join the company and quit manager. I joined the company and the manager because I knew my boss before I came to work here which is maybe a unique situation. So, for me a lot of my job satisfaction comes from working for [redacted] and the environment that creates ... Because even if I worked at this company for a different manager, I am going to have a totally different work experience.

In essence, the respondents cited a lack of consistency between managers, even within the same department. Additionally, many mentioned how well they thought things were in their department, but the conditions they cited were completely manager dependent. The researcher recognizes that these differences could be that the respondents truly see differences between managers, but it could also be a projection of how they view the company as a whole. The differences between managers and departments are therefore recognized as moderating factor within the theory of contextual ambidexterity. From a practitioner's perspective, in order to minimize the effect of this variable, the organization should anonymously survey employees to identify the managers regarded as having the best practices, work to understand these practices, and then implement the identified management practices across the organization. In addition to minimizing the effect of managerial differences, this process would also be a step in the implementation of best practices discussed earlier.

## **5.6 Unit of Analysis**

Within the context of the academic literature, this study proposes that the unit of analysis is not the individual, as has been proposed by the extant literature, but instead is the organizational department. It is noteworthy that departments are typically managed by individuals, and

therefore there is perhaps overlap between an individual construct and a departmental construct, but ultimately the creation of a high performance context is measured at the level of the group. However, as has been discussed in the previous research, while the creation of a high performance context is a group phenomenon, it remains up to the individual to become ambidextrous. In this study, this conclusion is supported first by the quantitative survey results and also by the qualitative interview findings. In essence, as demonstrated in the previously presented research findings, contextual ambidexterity is dependent on management and leadership behaviors. These can present as on-going feedback, implementation of innovative ideas, non-monetary incentives, or many other variables. Overall, though, these are behaviors that managers give consistently to subordinates, subordinates that are consistently organized into groups commonly referred to as departments. In addition, the focus of the unit of analysis on the department rather than the individual is supported by the consistency that the antecedents were found within, but not across, departments. Therefore, in both theory and practice, it is important for contextual ambidexterity to be addressed as a group phenomenon.

## **6.0 Conclusions**

This research convincingly found the antecedents to both the social support and performance management constructs of creating a high performance context and therefore enabling an organization to become contextually ambidextrous. The process towards this end involved a single case study of a mature, U.S. based manufacturing company. Specifically, a survey instrument was utilized to diagnose the performance level within the organization and to determine the departments that performed at a higher level than others. Once this state was diagnosed, in-depth interviews were conducted targeting employees situated in the identified low and high performing departments, as well as those outside the departments but who normally

associate with the identified departments. Utilizing the results of the survey and interviews, the researcher was able to determine the antecedents to the social support and performance management constructs of a high performance context. While it is recognized that the research was conducted within the environment of a mature manufacturing company, it is expected that the antecedents found would be applicable outside of this specific context.

## **6.1 Contributions**

The contributions gained from this research study can be divided into two distinct segments, those to the academic gap in knowledge and those applicable to the business practitioner.

First, this study demonstrates that the survey first propagated by Birkinshaw and Gibson (2004) is valid outside of its original context. In their study, they provided a succinct survey that was utilized in a high tech startup environment. As shown in the previous survey section of this document, the same survey, with a few additional questions and adjustments to make it more robust, to be explained later, works in a different environment.

In addition, this study also contributes to the gap in knowledge by adding specific trust questions to the survey instrument and then showing that the instrument is more robust with this addition. The antecedent of trust, as found during the interviews, is an antecedent to both social support and performance management and was necessary in this study to better explain both the topic and the phenomenon of interest. By including this subject area in the survey instrument and then showing the instrument to be valid, it will be possible for future researchers to utilize the same instrument in future research in the environment studied in this case. In addition, a future researcher can easily adapt the instrument to be utilized in different environments of interest.

Further, the inclusion of these questions provides a more robust understanding of creating a high performance context in any environment where the survey instrument is utilized.

Also, this study contributes a numerical scale embedded into the survey instrument. The survey instrument utilized by Birkinshaw and Gibson (2004) included an ambiguous seven point scale where the respondent was asked to rate the amount of time their manager spends exhibiting a specific behavior. The scale ranged from 'Not at all', to a midpoint of 'Neutral', and a high mark of 'To a very great extent'; their survey did not label the four responses in between the three already noted. The researcher considered these labels to be too ambiguous and subjective to be useful in the environment of interest and therefore refined the labels. In the survey instrument utilized for this study, all choices given to the respondent were clearly labeled and provided numerical equivalents of time; the exact labels and numerical time equivalents can be found in the appendix. These specific changes to the survey instrument were designed to produce more consistent subject responses and to therefore minimize label interpretation error. As shown in the previous survey section of this document, when these changes were made, the survey instrument proved to be valid. Consequently, these changes are an additional contribution to the academic gap in knowledge.

Moreover, this study contributes a one dimensional reflective measure of contextual ambidexterity. During the research process, the researcher noted that the current understanding of contextual ambidexterity was two dimensional and therefore it was difficult to compare different individuals, departments, or organizations to one another. By creating this reflective measure, such comparisons become more straightforward and allow the practitioner to better focus efforts on improving the antecedents of contextual ambidexterity that impact the measure. In addition, both the survey results and findings chapter conclusively demonstrate that the

constructs of performance management and social support are interwoven and as such the one dimensional measure must be the product, not the sum, of the performance management and social support measures. As will be discussed later in the implications section, further refinement to this measure may include the weighting of factors or departments within this reflective measure. In addition, this one dimensional reflective measure provides a more robust understanding of creating a high performance context while at the same time aids the non-academic practitioner in understanding the concept.

This study further contributes to the extant literature by demonstrating that the study of creating a high performance context should be focused on the group or department level, not on the individuals that make up the group, as has been previously proposed. While not a dramatic shift in focus, such a finding allows for a better understanding of the phenomenon of interest. As previously noted, departments and groups are typically managed by single individuals, and therefore there is possible overlap between an individual construct and a departmental construct, but ultimately creating a high performance context should be measured at the group level.

Further, this study provides a better understanding of the antecedents of creating a high performance context within the environment studied. Previous research, as shown in the literature review section, focus on contextual ambidexterity in a high tech startup environment. In addition, these studies focused more on where the organizations were within the realm of creating a high performance context and not on how they arrived there. This study, on the other hand, is built upon the previous research and the first to measure the creation of a high performance context in the specific environment. Further, and as previously discussed, numerous formerly unidentified antecedents were identified and therefore the phenomenon of interest is better understood.

For the business practitioner, this study contributes to a better understanding of the factors that lead an organization towards performing at a higher level and therefore capable of becoming contextually ambidextrous. Specifically, the factors that can aid an organization into performing at a high level can be divided into three distinct areas: social support, performance management, and business culture/environment. In an attempt to avoid being redundant, the practitioner related contributions will simply highlight the findings previously presented.

Within the realm of social support, this study finds that practitioners should focus on both job related and social on-boarding of new employees. In doing so, the organization not only makes the employee perform at a high level more quickly, but also ensures that they truly know their role and the available resources in the organization. A further tangible benefit of proper on-boarding is that the employee should feel like a member of the team and turnover should be reduced. Practitioners, in order to increase social support, should also be more supportive of employee risk taking. In allowing employees the authority to take the proper risks associated with their respective positions in the company, practitioners aid them in becoming more adept to changing business climates. This, in turn, leads to an organization that is fluid enough to navigate the challenges of a marketplace that is not static.

This study also contributes to the specific antecedents of the performance management construct of creating a high performance context. First, the personal performance goals of individual employees should relate to the specific company performance that the organization is attempting to create while at the same time consists of factors over which the individual employee has control. This is by no means an easy feat, but is vital for the employee to perform at a high level on items that push the organization not only forward, but in the desired direction. Related to this, formalized performance reviews need to occur frequently, and should be done at least quarterly.

During the period of time between these quarterly performance reviews, managers and direct reports should have frequent informal sessions where feedback is given in both directions concerning job performance. These three specific practitioner related contributions, as well as those established in the findings sections, are a portion of the contributions of this research.

Finally, in the practitioner field, this study contributes to an understanding of the impact of organizational culture on the ability to achieve contextual ambidexterity. As shown in the findings section, an organization wishing to become contextually ambidextrous needs to ensure that within its culture all departments understand the roles and responsibilities of the other departments. In doing so, knowledge transfer is enhanced while the duplication of effort is minimized. Additionally, this will lead to less friction between departments. Next, organizations need to ensure that there is a certain level of standardization between managers, departments, and processes without allowing such standardization to limit the flexibility that these entities have in facing changing conditions. Last, organizations need to identify the specific individuals, roles, and departments that are vital towards the whole organization performing at a high level. In this study, these departments were identified as Sales, Category Management, and Operations. Other organizations will need to identify similar departments in their structure and focus their efforts on those segments. The alignment of the culture of the organization with the antecedents of creating a high performance context will therefore enable the organization to become contextually ambidextrous.

As seen, despite being limited to a single case, this study contributed greatly to the understanding of creating a high performance context for practitioners while at the same time reducing the gap in knowledge in the literature.



## 6.2 Limitations

In this study, it is recognized that two primary limitations exist. First, as a single case study, the applicability of the findings to other business situations is limited. However, the depth provided within this study is thought to outweigh this limitation. In addition, this limitation is further mitigated since several different departments were studied and multiple data collection methodologies were utilized. Second, since the researcher was formerly employed by the target organization, it is recognized that an insider bias exists. This bias, however, is greatly outweighed by the level of access that a member of the organization retains. In fact, the identification of interview targets and then the openness of these targets to in-depth interviews would have been unobtainable to anyone who had not been embedded in the organization. Therefore, despite these limitations, the study adds greatly to the understanding of the phenomenon of interest.

## 6.3 Implications for Future Research

Due to the scope of the research project, the researcher was unable to fully explore additional areas as they came to light during the process. As such several different avenues of research should be explored by future researchers. First, the reflective measure of creating a high performance context should be explored in further detail. This should be tested in the original environment studied by the previous researchers, specifically high tech startup companies and, if proven valid, should then become the primary measure by which different individuals, departments, and firms are assessed. As mentioned earlier, measuring in a one dimensional scale allows a simple placement of the entity on a scale of creating a high performance context and therefore allows a cross departmental or entity categorization.

Future research should also focus on the group construct and attempt to understand the impact that an individual manager can have on the group. It would be of particular interest to understand how the performance level of the group can shift over time and how this can be impacted by the individual manager. For example, a study measuring the performance level of a department before an existing manager departs and after a new manager is installed should show the impact of a specific manager. This would be of particular interest if the two managers have contrasting styles of performance management and social support. In addition, such a study would allow further investigation into the antecedents of contextual ambidexterity.

Next, the practice and implications of socialized employee on-boarding needs to be explored in depth. As uncovered in this study, most firms engage in a more traditional on-boarding process that ranges from the mere completion of legally required paperwork to a very robust training of the specific job requirement. Within the realm of creating a high performance context, such on-boarding addresses the area of performance management, but fails to contribute to social support. As shown in this study, departments who engaged in both formal and informal social on-boarding were rated higher in contextual ambidexterity. The extant literature, however, fails to delineate the difference between on-boarding related to job performance and that related to socialization. Obviously, and especially within the framework of creating a high performance context, the two types of on-boarding need to be segregated and social on-boarding needs to be explored in more depth. In doing so, various methods of social on-boarding can be explored and the impact of the methods on employee and firm performance can be measured.

Furthermore, the frequency of both formal and informal performance reviews should be studied. As seen in the findings section, departments that offered regular feedback were rated higher in performance. Within the organization studied, these departments conducted formal reviews

semiannually and held feedback sessions on a very regular basis. Also as previously mentioned, the departments that scored the lowest in performance conducted reviews annually and offered no regular feedback. Therefore, the optimum frequency of both formal reviews and informal feedback sessions should be further explored. Additionally, practitioners, in order to improve company performance and therefore create ambidexterity, should immediately implement regular, informal feedback sessions with their direct reports and organizations should, if they have not already, implement semiannual formal performance reviews.

In addition, future research should explore if these same results could be replicated in a less mature manufacturing organization or mature non-manufacturing companies. Such testing would fill in the gap between the initial framework of creating a high performance context, specifically high tech startups, and the framework presented in this study. By doing so, the knowledge base would be expanded and business practitioners would have a functional catalog from which to choose how to best improve or expand performance in their respective firms. Similarly, the phenomenon should be studied in entities of different sizes, either much smaller or larger. In larger firms, the impact of geography on departmental performance could be better understood. For example, it is currently unknown whether departments dispersed over a vast area will have the same level of performance or if the distance will impact the measure. On the other side of the size scale, it is not understood if the measurement between departments will be more similar for smaller organizations.

Further, future research should test the antecedents identified in this study. With the understanding that far too many antecedents were identified to be thoroughly tested in a single research study, future researchers should limit the scope of a single study to a particular subsection of creating a high performance context and should test that subsection, either

quantitatively or qualitatively, across multiple business entities. In doing so, it would become evident which antecedents contribute more organization performance versus the others. In addition, it may also become evident that particular antecedents are business life cycle or industry specific, and then allow practitioners to tailor programs to their specific contexts.

Additionally, future research should explore the moderating impact of mid-level management on the social support provided by the company leadership. In the diagnostic survey utilized at the target organization, social support in a specific department situated in the burnout quadrant measured with little variation from the company average. However, during the interview process, interviewees from that department who reported directly to the departmental leader were glowing in their praise of the social support offered. In fact, more than one interviewee pointed out that the specific social support style and practices should be replicated throughout the organization. However, upon further examination of the survey data, it became apparent that the mid-level managers who reported directly to that leader rated the social support higher than those who were two levels down. Therefore, future research should focus on why the leader's social support did not translate through the department and should explore if mid-level managers had a moderating effect on the social support offered by organization leaders.

Further, future research should also examine if trust, both manager and leadership, is a moderating factor between the other social support antecedents and the social support construct. Throughout the interview process, nearly every interviewee noted that there was either a deficiency of manager or leadership trust. As such, and since the social support construct relies trust as a foundational antecedent towards becoming adaptable, it could be argued that the level of trust impacts the other antecedents. Therefore, future researchers should explore the moderating effect of trust on the other antecedents of social support. One method of

accomplishing this task would be to redesign the diagnostic survey to probe the moderating effects of trust on the other antecedents of social support.

Last, future research should explore the impact that the various departments within a single firm have on the establishment of a high performance context and the potential to create a context of ambidexterity within that firm. To better explain, for a company to perform at a high level, is it necessary for all departments to perform at a high level and therefore be capable of being ambidextrous, or are some departments more important than others? In measuring departmental performance, and assuming that some departments are more important than others, is it necessary to develop a departmental specific weighting to gauge the performance of the entire firm? Pushing this forward, how would the weighting vary across industries and maturity levels? Based on the findings of this study, a researcher should explore the impact of the performance levels of operations and sales, how that compares to that of the other departments, and what weight should be assigned to each. Further research should also identify the specific departments that are most valuable in specific industries. Future research questions could include: are operations and sales the most important departments in mature manufacturing companies, is research and development the most important in a high tech firm, and is there an organization where the back office functions are the highest weighted departments? In addition, these research questions could be adapted from 'which department is the most important' to 'how vital is a specific department' across industries? Not only would this second question aid practitioners in refining their organizations, but it would also aid individuals in choosing industries that are best suited to their individual traits and expectations.

## Appendix

### On-Line Questionnaire Invitation

September 20<sup>th</sup>, 2012

Hello,

You are invited to participate in a voluntary survey that is being conducted for a project assignment by a doctoral student, [redacted], [redacted], at Georgia State University. The purpose of the study is to investigate the link between company culture and performance. Your input is truly valued and is an essential part in allowing Darren to complete the project for his doctorate.

Please note that the research is not part of [redacted] traditional internal engagement survey. As such, the general action steps usually coming after a company survey will not take place. However, your feedback is important and will be helpful to Darren. The scope of the research is limited to U.S. based employees with email access. The limited survey target group was a decision of the researcher and represents nothing more than an effort to keep the amount data gathered manageable. We have asked Darren to communicate the high level results back to you after the research is finalized.

Your participation is voluntary and anonymous. The survey involves answering scale based and open ended questions about the culture at [redacted]. **All information regarding responses will be kept confidential and cannot be linked back to you.** Therefore, you have the ability to be as open and forthright in your responses as you wish. Please ensure that you complete the survey by October 4<sup>th</sup>, 2012.

Thank you in advance for taking the time to complete the survey that appears below.

If you wish to participate, please click the following link:

[GSU Dissertation Darren Allen](#)

## **On-Line Questionnaire Protocol**

### **Statement of Informed Consent**

Dear Participant: Thank you for choosing to participate in this research project. Your responses will be kept confidential and only viewed by the researchers. Our research focuses on aspects of culture within U.S. manufacturing companies. Our intention is not to judge any thoughts or actions taken, but to comprehend their contextual nature in order to better understand the culture within certain organizations. On the next few pages you will find a series of questions designed to capture your thoughts and feelings regarding company culture. This questionnaire is comprised of three sections. Section 1 includes this introduction and a Statement of Informed Consent. Section 2 includes your demographic information. Section 3 is designed to capture your feelings concerning the culture of the company. Where appropriate, we ask you to be as descriptive as possible. We wish to understand your thoughts and the reasons behind your answers. If you have stories, analogies, or anecdotes you wish to share that will help us to better understand your thoughts and the circumstances behind your answers, please include them. Names or other identifying information will not be gathered and therefore your submission is completely anonymous.

#### Statement of Informed Consent:

I. Statement of Informed Consent: Thank you for your participation in this research study. Your participation is completely voluntary, and all responses will be kept strictly confidential. The purpose of the study is to investigate culture within [redacted] . Your consent to participate is indicated by answering the question at the bottom of this page.

II. Procedures: The questions on the following pages ask a series of scale and open ended questions. Your answers will be combined with other responses and analyzed for content.

III. Risks: In this study, you will not have any more risks than you would in a normal day of life.

IV. Benefits: Participation in this study may not benefit you personally. Overall, we hope to gain information about the business community and the area of corporate culture.

V. Voluntary Participation and Withdrawal: You do not have to be in this study. Your decision to participate will not be shared with your company, or any other party. If you decide to be in the study and change your mind, you have the right to drop out at any time. If, after submitting your answers, you wish to withdraw your consent of participation, please send an email request to:

dallen24@student.gsu.edu. You may skip questions or stop participating at any time. Whatever you decide, you will not lose any benefits to which you are otherwise entitled. For your information, only researchers or designated representatives for the research project (for language or logistical reasons) will be privy to your individual answers. As part of our research protocol, we make the following statements: 1) all information will be held strictly confidential, 2) your participation is voluntary and at any time if you feel uncomfortable, you may withdrawal your permission, 3) there is no intention to

inflict any harm, and 4) your agreement to participate is implied by your completion of this questionnaire and submission to the researchers. Thank you for your participation.

- Yes; I agree to participate according to the above conditions.
- No; I do not agree to participate.

A. In which department are you currently employed in at the company?

- Sales
- Marketing
- Category Management
- Research and Development
- Finance
- Human Resources
- Customer Service
- Administration
- Operations
- Division
- Other

Because you selected 'Other', please specify your department below



B. Please respond to the following statements as they apply to your present job situation and [redacted] . The scale should be used to indicate how often managers at the company exhibit the described behavior. The text box can be utilized for clarification.

	Never: 10% or less	Rarely: 11%-25%	Sometimes: 26%- 44%	Half the time: 45%-55%	More often than not: 56%-74%	Frequently: 75%-89%	Always: 90%-100%
1. Managers set challenging/aggressive goals.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Managers issue creative challenges to their people instead of narrowly defining tasks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Managers drive their employees to contribute more.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. I think it is important to watch management closely so that it does not take advantage of its employees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Managers use business goals and performance measures to run their departments.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Managers hold people accountable for their performance.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Managers encourage and reward hard work through incentives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please elaborate on how the company manages and measures the performance of its employees:

C. Please respond to the following statements as they apply to your present job situation and [redacted]. The scale should be used to indicate how often managers at [redacted] exhibit the described behavior. The text box can be utilized for clarification.

	Never: 10% or less	Rarely: 11%-25%	Sometimes: 26%-44%	Half the time: 45%-55%	More often than not: 56%-74%	Frequently: 75%-89%	Always: 90%-100%
1. Managers devote considerable effort to developing subordinates.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Managers push decisions down to the lowest appropriate level.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. My manager does not value my opinion.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Managers have access to the information they need to make good decisions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Managers quickly replicate best practices across departmental boundaries.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Managers treat failure in a good effort as a learning opportunity, not as something to be ashamed of.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Managers are willing to take prudent risks.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please elaborate on how the organization supports its employees to become better in their positions:

D. How would you rate your overall job satisfaction?

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
How would you rate your overall job satisfaction?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

E. Please respond to the following statements as they apply to your present job situation and [redacted]. The scale should be used to indicate how often you feel the situation applies to you personally. The text box can be utilized for clarification.

	Never: 10% or less	Rarely: 11%-25%	Sometimes: 26%-44%	Half the time: 45%-55%	More often than not: 56%-74%	Frequently: 75%-89%	Always: 90%-100%
1. I feel that the pressures of my job are consistently overwhelming.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. I feel that I am positively influencing other people's lives through my work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. I feel that I am working too many hours at my job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. I feel that co-workers blame me for some of their problems.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. I feel that I am very energetic while at work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. I feel that the expectations placed on me are reasonably achievable and sustainable (there is light at the end of the tunnel).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please elaborate on how you feel the culture of the organization may or may not be leading towards employee burnout:

F. Please respond to the following statements as they apply to your present job situation and [redacted]. The scale should be used to indicate how often you feel the situation applies to you personally. The text box can be utilized for clarification.

	Never: 10% or less	Rarely: 11%-25%	Sometimes: 26%-44%	Half the time: 45%-55%	More often than not: 56%-74%	Frequently: 75%-89%	Always: 90%-100%
1. I feel that decisions made by my manager are made in a fair and even handed manner.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. I feel that there is transparency in the decision making process.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. I feel that I am confident in the company's problem solving skills.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. I feel that this organization is trying to maintain a long-term commitment to people like me.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. I have a sense of loyalty to this organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. I do not believe people like me can influence the decision makers of this organization.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. I feel that this organization really listens to what people like me have to say.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. I feel that decisions made by the company's executives are made in a fair and even handed manner.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please elaborate on how you feel concerning the level of trust you place in the organization:

G. How would you rate the overall company performance over the past year in the following four areas:

	Poor	Weak	Neutral	Good	Excellent	I do not know
1. Overall Sales	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Profitability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Customer Retention	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Market Share	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

H. What is your current level within the organization?

- Executive
- Director
- Assistant Director
- Senior Manager
- Manager
- Functional Lead
- Staff
- Contractor/Temporary
- Other

Because you selected 'Other', please specify your level with the organization

I. Prior to your current position, what was your previous level within the organization?

- Executive
- Director
- Assistant Director
- Senior Manager
- Manager
- Functional Lead
- Staff
- Contractor/Temporary
- Other
- First job with the company

Because you selected 'Other', please specify your previous level with the organization

J. What year did you join the company?

- 2012
- 2011
- 2010
- 2009
- 2008
- 2007
- 2006
- 2005
- 2004
- 2003
- 2002
- 2001
- Before 2001

## Survey Statistical Results

### Social Support Reliability

**Component Matrix**

		Component
		1
	Social Support 1	.782
	Social Support 2	.668
	Social Support 3	.720
	Social Support 4	.789
	Social Support 5	.817
	Social Support 6	.866

**Reliability Statistics**

Alpha	N of Items
.822	5

### Performance Management Reliability

**Component Matrix**

		Component
		1
	Performance Management 1	.795
	Performance Management 2	.819
	Performance Management 3	.822
	Performance Management 4	.794
	Performance Management 5	.733
	Performance Management 6	.690

**Reliability Statistics**

Alpha	N of Items
.867	6

### Trust Reliability

**Component Matrix**

		Component
		1
	Trust1	.737
	Trust2	.761
	Trust3	.791
	Trust4	.841
	Trust5	.628
	Trust8	.814
	Trust9	.862

**Reliability Statistics**

Alpha	N of Items
.888	7

## Descriptive Statistics

	N	Minimum	Maximum	Mean	Deviation
perf1	134	1.0	7.0	4.7612	1.7176
perf2	134	1.0	7.0	3.7537	1.8082
perf3	134	1.0	7.0	4.4925	1.8178
perf4	134	1.0	7.0	4.7388	1.7296
perf5	134	1.0	7.0	4.3955	1.9812
perf6	134	1.0	7.0	3.0149	1.6902
socialsup1	133	1.0	7.0	3.2030	1.7090
socialsup2	133	1.0	7.0	3.6466	1.7416
socialsup3	134	1.0	7.0	2.8955	2.0048
socialsup4	133	1.0	7.0	4.4436	1.5096
socialsup5	134	1.0	7.0	3.4254	1.7786
socialsup6	133	1.0	7.0	3.9549	1.8293
socialsup7	133	1.0	7.0	3.7368	1.7490
Valid N (listwise)	130				



## Survey Correlations

		perf1	perf6	socialsup1	socialsup2	socialsup4	socialsup5	socialsup6	socialsup7	Trust1	Trust2	Trust3	Trust4	Trust5	Trust8
perf1	Pearson Correlation	1	.382**	.523**	.215*	.261**	.425**	.406**	.486**	.545**	.420**	.216*	.255**	.269**	.396**
	Sig. (2-tailed)		.000	.000	.013	.002	.000	.000	.000	.000	.000	.014	.003	.002	.000
	N	134	134	133	133	133	134	133	133	133	130	130	130	129	128
perf6	Pearson Correlation	.382**	1	.649**	.215*	.394**	.413**	.402**	.488**	.574**	.527**	.418**	.517**	.282**	.543**
	Sig. (2-tailed)	.000		.000	.013	.000	.000	.000	.000	.000	.000	.000	.000	.001	.000
	N	134	134	133	133	133	134	133	133	130	130	130	129	128	130
socialsup1	Pearson Correlation	.523**	.649**	1	.363**	.490**	.565**	.512**	.672**	.574**	.603**	.369**	.450**	.284**	.516**
	Sig. (2-tailed)	.000	.000		.000	.000	.000	.000	.000	.000	.000	.000	.000	.001	.000
	N	133	133	133	133	132	133	132	132	129	129	129	128	127	129
socialsup2	Pearson Correlation	.215*	.215*	.363**	1	.288**	.407**	.488**	.514**	.330**	.355**	.227**	.266**	.124	.262**
	Sig. (2-tailed)	.013	.013	.000		.001	.000	.000	.000	.000	.000	.010	.002	.163	.003
	N	133	133	133	133	132	133	132	132	129	129	129	128	127	129
socialsup4	Pearson Correlation	.261**	.394**	.490**	.288**	1	.516**	.517**	.555**	.496**	.441**	.389**	.456**	.223	.451**
	Sig. (2-tailed)	.002	.000	.000	.001		.000	.000	.000	.000	.000	.000	.000	.012	.000
	N	133	133	132	132	133	133	132	132	129	129	129	128	127	129
socialsup5	Pearson Correlation	.425**	.413**	.565**	.407**	.516**	1	.572**	.573**	.456**	.433**	.385**	.440**	.301**	.388**
	Sig. (2-tailed)	.000	.000	.000	.000	.000		.000	.000	.000	.000	.000	.000	.001	.000
	N	134	134	133	133	133	134	133	133	130	130	130	129	128	130
socialsup6	Pearson Correlation	.406**	.402**	.512**	.488**	.517**	.572**	1	.645**	.618**	.509**	.287**	.392**	.296**	.405**
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000		.000	.000	.000	.001	.000	.001	.000
	N	133	133	132	132	132	133	133	132	129	129	129	128	127	129
socialsup7	Pearson Correlation	.486**	.488**	.672**	.514**	.555**	.573**	.645**	1	.627**	.577**	.473**	.523**	.320**	.521**
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000		.000	.000	.000	.000	.000	.000
	N	133	133	132	132	132	133	132	133	129	129	129	128	127	129
Trust1	Pearson Correlation	.545**	.574**	.574**	.330**	.496**	.456**	.618**	.627**	1	.602**	.421**	.485**	.287**	.554**
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000		.000	.000	.000	.001	.000
	N	130	130	129	129	129	130	129	129	130	130	130	129	128	130
Trust2	Pearson Correlation	.420**	.527**	.603**	.355**	.441**	.433**	.509**	.577**	.602**	1	.499**	.543**	.337**	.600**
	Sig. (2-tailed)	.000	.000	.000	.000	.000	.000	.000	.000	.000		.000	.000	.000	.000
	N	130	130	129	129	129	130	129	129	130	130	130	129	128	130
Trust3	Pearson Correlation	.216*	.418**	.369**	.227**	.389**	.385**	.287**	.473**	.421**	.499**	1	.733**	.569**	.515**
	Sig. (2-tailed)	.014	.000	.000	.010	.000	.000	.001	.000	.000	.000		.000	.000	.000
	N	130	130	129	129	129	130	129	129	130	130	130	129	128	130
Trust4	Pearson Correlation	.255**	.517**	.450**	.266**	.456**	.440**	.392**	.523**	.485**	.543**	.733**	1	.590**	.559**
	Sig. (2-tailed)	.003	.000	.000	.002	.000	.000	.000	.000	.000	.000	.000		.000	.000
	N	129	129	128	128	128	129	128	128	129	129	129	129	127	129
Trust5	Pearson Correlation	.269**	.282**	.284**	.124	.223**	.301**	.296**	.320**	.287**	.337**	.569**	.590**	1	.323**
	Sig. (2-tailed)	.002	.001	.001	.163	.012	.001	.001	.000	.001	.000	.000	.000		.000
	N	128	128	127	127	127	128	127	127	128	128	128	127	128	128
Trust8	Pearson Correlation	.396**	.543**	.516**	.262**	.451**	.388**	.405**	.521**	.554**	.600**	.515**	.559**	.323**	1
	Sig. (2-tailed)	.000	.000	.000	.003	.000	.000	.000	.000	.000	.000	.000	.000	.000	
	N	130	130	129	129	129	130	129	129	130	130	130	129	128	130
Trust9	Pearson Correlation	.353**	.476**	.437**	.219*	.363**	.342**	.357**	.466**	.607**	.570**	.577**	.663**	.405**	.772**
	Sig. (2-tailed)	.000	.000	.000	.013	.000	.000	.000	.000	.000	.000	.000	.000	.000	.000
	N	129	129	128	128	128	129	128	128	129	129	129	128	127	129

\*\* . Correlation is significant at the 0.01 level (2-tailed).

\* . Correlation is significant at the 0.05 level (2-tailed).

## **Interview Protocols**

### **Interview Guideline for Current Employees**

#### 1. Background:

- A. In which department are you employed in at the company?
- B. What is your current title in the organization?
  - i) How long have you been in the position?
  - ii) What was your position prior to that one?
  - iii) When did you join the company?

#### 2. Company Culture:

- A. Corporate culture is very important, but it's usually hard to define until one violates it.  
What is one thing an employee might do here that would be perceived as a violation of the company's culture?
- B. How would you characterize the organization? What are its principal values? What are its greatest challenges?
- C. How would you describe the experience of working here?
- D. What are a couple of misconceptions people have about the company?
- E. Work-life balance is an issue of retention as well as productivity. Can you talk about your own view of how to navigate the tensions between getting the work done and encouraging healthy lives outside the office?
- F. How does the company support and promote personal and professional growth?
- G. What types of people seem to excel here?

H. Every company contends with office politics. It's a fact of life because politics is about people working together. Can you give me some examples of how politics plays out in this company?

I. How is the culture in your department different from that in other departments?

3. Burnout:

A. How does the company feel about workaholics?

B. Do you ever feel that you do more than your fair share when part of a team or project?

C. What does the company do when it feels someone is getting behind in their work?

D. What does the company do when an employee is unable to meet their job requirements?

E. How many hours a week do the salaried people in your department usually work? Do you consider this excessive?

4. Performance Management:

A. How does the company set challenging and aggressive goals for employees?

B. How does the company issue creative challenges?

C. How does the company incentivize you to work harder?

D. How are people held accountable for their performance?

E. How often are performance reviews conducted? Are they constructive? What improvements can be made?

5. Social Support:

- A. How does the company aid in employees developing to their full potential?
- B. How often and in what manner does the company push decisions down to the lowest appropriate level?
- C. How does the organization ensure best practices are shared across entities?
- D. How has the company shown it treats failure as a learning opportunity?
- E. How does the company effectively on-board new employees?
- F. How does the company manage risk taking by managers and employees?

6. Trust:

- A. Have you ever had an innovative idea that you shared (or did not share) with your superiors? How was it received? Or, why did you choose not to share it?
- B. How does the company demonstrate it values your opinion?
- C. How does the company show transparency in the decision making process?
- D. How open are the leaders of the company to contradictory viewpoints?
- E. How does the company show it values a long-term commitment from its employees?
- F. Do you trust that decisions made at the highest levels of the organization are fair and consistent?

## **Interview Guideline for Former Employees**

### 1. Background:

- B. In which department were you employed in at the company?
- C. What was your title when you left the organization?
  - iv) How long were you in your final position?
  - v) What was your position prior to that one?
  - vi) When did you join the company?
  - vii) What were the circumstances regarding your departure from the organization?

### 2. Company Culture:

- A. Corporate culture is very important, but it's usually hard to define until one violates it.  
What is one thing an employee might do within the organization that would be perceived as a violation of the company's culture?
- B. How would you characterize the organization? What are its principal values? What are its greatest challenges?
- C. How would you describe the experience of working there?
- D. What are a couple of misconceptions people have about the company?
- E. Work-life balance is an issue of retention as well as productivity. Can you talk about your own view of how to navigate the tensions between getting the work done and encouraging healthy lives outside the office?
- F. How did the company support and promote personal and professional growth?
- G. What types of people seemed to excel there?

H. Every company contends with office politics. It's a fact of life because politics is about people working together. Can you give me some examples of how politics played out in this company?

I. How is the culture in your last department different from that in other departments?

3. Burnout:

A. How did the company feel about workaholics?

B. Do you ever feel that you worked more than your fair share when part of a team or project?

C. What did the company do when it feels someone is getting behind in their work?

D. What did the company do when an employee is unable to meet their job requirements?

E. How many hours a week did the salaried people in your department usually work? Do you consider this excessive?

4. Performance Management:

A. How did the company set challenging and aggressive goals for employees?

B. How did the company issue creative challenges?

C. How did the company incentivize you to work harder?

D. How were people held accountable for their performance?

E. How often were performance reviews conducted? Were they constructive? What improvements could have been made?

5. Social Support:

- A. How did the company aid in employees developing to their full potential?
- B. How often and in what manner did the company push decisions down to the lowest appropriate level?
- C. How did the organization ensure best practices are shared across entities?
- D. How did the company shown it treats failure as a learning opportunity?
- E. How did the company effectively on-board new employees?
- F. How did the company manage risk taking by managers and employees?

6. Trust:

- A. Did you ever have an innovative idea that you shared (or did not share) with your superiors? How was it received? Or, why did you choose not to share it?
- B. How did the company demonstrate it values your opinion?
- C. How did the company show transparency in the decision making process?
- D. How open were the leaders of the company to contradictory viewpoints?
- E. How did the company show it values a long-term commitment from its employees?
- F. Did you trust that decisions made at the highest levels of the organization are fair and consistent?

## Code Summary

Code	Sources	References
Culture - Departmental or Manager Differences	18	104
Social Support - Ineffective on boarding	17	69
Performance Management - Goals do not relate to department or individual	16	59
Social Support - Decisions not pushed down	15	51
Trust - Negative leadership trust	16	49
Trust - Positive leadership trust	18	44
Social Support - Risk taking ineffectively managed	16	42
Culture - Challenges - Poor internal communication	13	42
Burnout - Workaholics encouraged	18	41
Social Support - Best practices are not shared	18	40
Culture - Changing	14	40
Culture - Politics are present	17	39
Culture - Challenges - Poor procedures	14	38
Social Support - Company does not work to develop employees	16	38
Culture - Siloed Departments	14	37
Trust - Innovative shared	20	35
Performance Management - Does not set challenging goals	11	31
Performance Management - People not accountable	11	31
Burnout - Self manage balance	16	31
Social Support - Decisions pushed down	13	30
Performance Management - Incentivized through monetary means	15	30
Burnout - Company helps underperformer	11	30
Social Support - Aid - Self Motivate	12	29
Performance Management - People accountable	14	29
Trust - Transparency not demonstrated	16	29
Inconsistentcy	10	29
Operations Culture	4	28
Trust - Values opinion	16	27
Burnout - More than fair share	16	27
Culture - Departments do not understand other's roles	13	27
Social Support - Failure treated as a learning opportunity	12	25
Culture - Excel - hard workers	15	25
Social Support - Failure is not treated as a learning opportunity	10	24
Performance Management - Reviews Constructive	13	24
Trust - Long term commitment not valued	14	24
Burnout - Someone behind is helped	11	23
Social Support - Employee Development	12	23
Culture - Violation - Customer centric	10	21
Burnout - Too many hours	11	20
Performance Management - Measurable Performance	8	20
Trust - Long term commitment valued	13	19
Culture - Exceling related to individual's skills	10	19



<b>Code</b>	<b>Sources</b>	<b>References</b>
Performance Management - Does not issue creative challenges	13	18
Trust - Contradiction valued	11	18
Social Support - Need better training	8	18
Culture - Friction between departments	9	18
Culture - Turnover	5	18
Sales Culture	5	18
Performance Management - Reviews more frequent	9	17
Burnout- Priorities or lack of lead to Burnout	9	17
Trust - Transparency demonstrated	8	16
Burnout - Company terminates underperformer	9	16
Performance Management - Reviews semi-annual	11	15
Burnout - Correct hours	11	15
Social Support - Risk taking effectively managed	8	14
Performance Management - Reviews annual	13	14
Performance Management - Reviews not constructive	9	14
Culture - Violation - Hostility	6	14
Culture - Uncertainty	9	14
Culture - Controlled chaos	4	14
Trust - Contradiction not valued	7	13
Culture - Hard Workers	5	13
Performance Management - Incentivized through self motivation	7	12
Culture - Department Culture - What ever it takes	7	12
Social Support - Promote from within	5	12
Performance Management - Non Monetary Rewards	8	12
Culture - Poor profit decisions	7	12
Culture - Unsure of business model	2	12
Social Support - Best practices are shared	6	11
Performance Management - Issues creative challenges	8	11
Culture - Work-Life Balance - unable	7	11
Trust - Idea not acted on	7	11
Performance Management - Not incentivized to work harder	8	11
Culture - Complex Organization	6	11
Culture - Team work	4	11
Social Support - Effective on boarding	3	10
Performance Management - Make measurements accurate	7	10
Social Support - Need better job documentation	2	10
Culture - Excel Self Promotion	7	10
Burnout - No corrective action	3	9
Culture - Challenging	7	9
Culture - Leadership does not work well together	2	9
Performance Management - Regular Feedback	3	9
Performance Management - Sets challenging goals	4	8
Trust - Does not value opinion	5	8
Social Support - Failure is not punished	6	8
Culture - Unsure of company performance	4	8
Social Support - New Employees Not Valued	6	8
Culture - Inter department collaboration	3	8

<b>Code</b>	<b>Sources</b>	<b>References</b>
Culture - Challenges - Fractured	5	7
Culture - No politics	5	7
Culture - Company does things the way it always has	4	7
Social Support - Company should mandate training	4	7
Culture - Inflexible	6	7
Social Support - Inflexibility in Job	3	7
Culture - Not enough fun	4	7
Culture - Too busy to work to make the company better	3	7
Burnout - Not more than fair share	5	6
Culture - Violation - Negative attitude toward company	5	6
Burnout - Manager reprimands underperformer	6	6
Culture - The company is slow to change	5	6
Culture - Passion for the product	5	6
Culture - Violation - Poor Communications	3	6
Culture - Excel - Good Communication	4	6
Culture - Violation - Integrity	4	6
Culture - Sales feels isolated	2	6
Performance Management - Reviews need structure and consistency	3	6
Culture - Violation - Not working hard	2	6
Culture - Violation - Share info with competitor	4	5
Culture - Excel - relationships	4	5
Great company to work for	5	5
Culture - Company rewards performance	3	5
Performance Management - Manager issues creative challenges	3	5
Compensation is out of alignment	2	5
Culture - No one has heard of company	3	5
Culture - Not as good as we think we are	1	5
Trust - Innovative was not shared	3	4
Burnout - Workaholics discouraged	3	4
Culture - Challenges - Balance	4	4
Culture - Work-Life Balance - self initiative	3	4
Culture - Interdepartment communication is good	3	4
Culture - Company does not learn from mistakes	2	4
Burnout - Company helps maintain balance	4	4
Culture - Motivated through fear	2	4
Social Support - Open Communications	2	4
Social Support - Social on boarding effective	3	4
Social Support - Flexibility In Job	2	4
Culture - Lack of Clear Goals	2	4
Culture - Violation - Safety	1	4
Performance Management - Reviews not taken seriously	2	4
Culture - Only about making money	1	4

Code	Sources	References
Burnout - Someone behind is not helped	3	3
Burnout - Company transfers underperformer	3	3
Culture - Misconceptions - departmental roles	2	3
Culture - Violation Poor Profit Decision	2	3
Performance Management - Need 360 Review	1	3
Social Support - Decisions pushed down when leader is unsure	1	3
Burnout - Company should aid workaholics	2	3
Culture - Burnout	2	3
Culture - Can make a difference	1	3
Performance Management - On-going appraisals	2	2
Performance Management - Quarterly Reviews	2	2
Performance Management - Reviews Over Complicated	2	2
Culture - Violation - No Transparency in Decisions	1	2
Culture - Risk adverse environment	1	2
Culture - Departments work well together	2	2
Management through consensus	1	2
Culture - Self Centered excel	1	2
Culture - Inconsistent Time Horizon	1	2
Performance Management - Incentivized through future opportunity	2	2
Trust - Does not seek input from lower level employees	1	2
Culture - Hard to do business with	1	2
Culture - No long term planning	1	2
Culture - Managers do not lead by example	1	2
Culture - Violation dwelling on past	1	2
Culture - Quality Product	2	2
Culture - Do not celebrate successes	1	2
Performance Management - Incentivized by keeping my job	1	1
Culture - Growth - not promoted	1	1
Compensation is very good	1	1
Culture - People get along	1	1
Social Support - Succession Planning not present	1	1
Performance Management - No recognition	1	1
Culture - Well Positioned for Future	1	1
Social Support - Mentor	1	1
Culture - Poor execution of plans	1	1
Social Support - Does not develop employee for promotion	1	1
Culture - Employees want company to be successful	1	1
Performance Management - Variety of tasks	1	1
Culture - Challenge - Employee Retention	1	1
Burnout - Too few hours	0	0
Culture - Work-Life Balance - set hours	0	0

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## Vita

Darren K. Allen earned his BA from the University of North Carolina at Chapel Hill and his MBA from Appalachian State University. After earning his MBA, Darren worked his way up the career ladder in finance and accounting roles at companies such as Newell Rubbermaid, General Mills, and Genuine Parts Company. Currently, Darren is the CFO – Vice President of Finance at Autolite Spark Plug, a multinational manufacturer and leading supplier to OE car manufacturers as well as the automotive aftermarket. Overall, Darren has made his career playing an integral role in turning around manufacturing organizations.

Darren currently splits his time between Atlanta, Georgia; Chicago, Illinois; and Mexicali, Baja California, Mexico.