

THESIS FOR THE DEGREE OF LICENTIATE OF PHILOSOPHY

Change models in need of renewal: Building strategic practice to
prevail in industry transitions

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Contents

- Abstract 5**
- Preface 6**
- Acknowledgements..... 7**
- Appended papers 8**
- 1 Introduction 9**
- 2 Framing my research question 12**
- 3 Frame of reference..... 14**
 - 3.1 Managing change 14**
 - 3.2 Organizational renewal – a special case of change..... 14**
 - 3.3 Factors of change..... 16**
 - 3.3.1 Vision of the future state 16**
 - 3.3.2 A clear process ahead 17**
 - 3.3.3 Dissatisfaction with current state 18**
 - 3.3.4 Costs of change 18**
- 4 Research methodology 20**
 - 4.1 Choice of overall research approach..... 20**
 - 4.2 Empirical environment 21**
 - 4.3 Data collection and analysis..... 22**
 - 4.4 Issues of research quality..... 23**
- 5 Appended papers..... 24**
 - 5.1 Paper 1..... 24**
 - 5.2 Paper 2..... 24**

5.3	Paper 3.....	25
6	Discussion.....	26
6.1	Organizing for organizational renewal.....	26
6.2	Discussing factors of change in relation to renewal	26
6.2.1	The need for a vision when the future is unknown	26
6.2.2	A clear process that needs to be emergent	28
6.2.3	Dissatisfaction with current state without fear.....	28
6.2.4	Emotions as costs or assets.....	29
6.3	Towards a formula for renewal.....	30
7	References.....	32

Change models in need of renewal: Building strategic practice to prevail in industry transitions

Abstract

Organizations find it hard to survive industry transitions. To succeed, organizations need to rethink the way they do business and the renewal efforts have to overcome the lock-in created by the organizational system, capabilities and organizational culture. Moreover, in an industry transition a clear view of what to change into is often lacking. This could be seen as a special case of change: a case of renewal.

One suggested way of succeeding with renewal is to separate the new from the old (structural ambidexterity). However, that is not always possible. In such situations, the old and the new have to co-exist and develop simultaneously (contextual ambidexterity). In this licentiate thesis, the latter is discussed.

This calls for a practice, where renewal initiatives cannot rely on traditional change models. Change processes are often assumed to be guided by a vision for the future and a clear process ahead, outlined by management. Instead, in the case of renewal, a practice is needed where the organization creates the road ahead, utilizing organizational capabilities such as creativity and learning,

How traditional prerequisites for change apply in a renewal context is discussed in this licentiate thesis, leading to a proposal of how the well-known “change formula” (representing traditional change models) could be modified to be relevant in the context of renewal. I argue that this thesis contributes to the understanding of what is needed to succeed with renewal, hence taking a step towards building strategic practice to prevail in industry transitions.

The empirical data for this thesis is presented in three appended papers. Paper 1 and 3 draw on a longitudinal study of a media group, studying their renewal initiatives in the midst of an ongoing industry transition. In paper 2, 10 different strategy processes were followed, with data from 28 strategy creation workshops. The data has predominantly been collected through action research.

Key words: renewal; change; industry transition; innovation; urgency, creativity; change formula; strategic practice; contextual ambidexterity; action research

Preface

During more than 15 years of working with management issues – as a consultant, line manager and CEO – I have been involved with several change processes. Some of the processes have been radical, renewal initiatives, some have had the character of continuous improvements. Some of them have failed, some of them have been considered successes. Looking back I rarely find examples of change processes where I honestly could say that the organization collectively moved towards a new interesting and hopefully prosperous future. In many cases it was far easier to see that the activities carried out were a product of fear of failure rather than an urge to succeed.

In the context of industry transitions, where organizations need to find completely new ways of doing business and shift their working model, this way of approaching change seems detrimental. In a renewal context, taking advantage the full potential and capabilities of the people involved, using the creativity and innovativeness within people, is key. However, in renewal processes I have seen, my perception is that the opposite often takes place. Management tries to take control over the pressured situation by limiting options and possibilities to come up with new thoughts and ideas by delivering the new strategic agenda from the top, in detail and with few opportunities to deviate.

Most of the management teams I have worked with, or worked in, know their stuff. They have a toolbox for many things and change processes are no exceptions. Since they – or we – still were not able to make renewal happen, it made me question whether we have the right thinking, models and tools for renewal of today.

Given my background, it is important to acknowledge and be aware of the presumptions I am carrying with me from my previous experience. In my research, I take a system perspective, since I am interested in how different parameters are contributing to the whole system. However, one main presumption is that change and innovations are first and foremost created by human beings – affecting and affected by systems. This will guide me into being interested what motivates people to actually contribute to renewal, to create renewal through changing thoughts and behaviors.

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My husband says that I come home from work energized almost every day. That is primarily due to one person. Thank you Tobias Fredberg, my main supervisor. Not only do you challenge me, guide me and help me. You also cherish the art of having fun.

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To everyone at the department of Strategy and Entrepreneurship – thank you. I believe we can make wonders together: Let's be the heroes of our time.

I am also thankful to Vinnova, for supporting our study in the media industry as well as to the organizations that let me in to study them.

Moreover, people representing TruePoint and Center for Higher Ambition Leadership as well as my clients – thank you for the inspiration, discussions and opportunities to learn. Also, a thanks to people in my network – in academy and in practice, all over the world. It is a true privilege to have the opportunity to discuss the challenges of our time with you.

Most importantly, thank you family and friends. You all set the practical and emotional foundation in my life. Without it I probably would not create anything of value at all.

A special thanks to the ones I love the most. Magnus, Ella and Hugo – this, as most other things, is for you.

Johanna Pregmark, November, 2016

Appended papers

This thesis is based on the work contained in the following papers.

- i. Transformation in a tightly nested system; employing fast cycles of change

Fredberg, T & Pregmark, J. 2016. in *Research in Organizational Change and Development*. Noumair, D & Shani, AB (eds.), vol 24; p. 185-219

- ii. Taking advantage of wider participation in strategy workshops: Trust as an enabler

Pregmark, J. 2016. Presented at *SMS Annual Conference*, Berlin, Germany, 17-20 September, 2016

- iii. The paradox of innovation and urgency

Fredberg, T & Pregmark, J. 2016. *IMIT Research Report 2016:2*. Available at www.imit.se/rappporter (accessed Nov 25, 2016), An earlier version of this paper was presented at the *ISPIM Innovation Forum*, Boston, MA, USA, 13-16 March 2016

1 Introduction

This licentiate thesis discusses “organizational renewal” as a special case of change, resulting from industry transitions. Tushman & O’Reilly (1999), interviewed in an article for HBS working knowledge, describes organizational renewal as a managerial challenge to leap from strength to strength to strength, thereby stating that organizational renewal is not so much about leveraging the current situation as it is about finding the next strength to build the business around. Hence, organizational renewal goes beyond improvements of merit. Moreover, in this thesis it is discussed as something that needs to happen in a context of industry transition, characterized of a situation where the future configuration is unknown (Christensen, 1997) and when it is not possible to separate the new from the old (structural ambidexterity) as described by Tushman & O’Reilly, 1996; Smith et al. 2010. Accordingly, in this licentiate thesis, organizational renewal is defined as a special case of change where:

- Needed change goes beyond improvements of merit
- Vision or model of a future state is lacking
- Renewal needs to happen within the organization (contextual ambidexterity, Smith et al., 2010)

Organizational renewal is gaining in importance, since forces like digitalization are making the speed and magnitude of change greater and are putting more industries in transition (Reeves & Deimler., 2011). It is also clear that organizations find it hard to survive industry transitions (Abernathy & Utterback, 1978; Christensen, 1997; Christensen & Rosenbloom, 1995; Miller, 1990; Suárez & Utterback, 1995; Utterback, 1994). To succeed, renewal efforts need to overcome the lock-in created by the organizational system, capabilities, loyal customers, and organizational culture (Christensen, 1997; Christensen & Raynor, 2003; Danneels, 2002, 2003; Henderson, 2006; Foster & Kaplan, 2001). Hence, to change one part of the organization will not do. Instead, the whole system needs to be taken into account.

Moreover, it is suggested by Huy (1999) that renewal demands different organizational capabilities, related to for example commitment, learning and creativity (Huy, 1999; 2005; Beer, 2009) and connected to that, different motivation and positive emotions (Huy, 1999; 2005; Fredrickson, 2003; Amabile & Kramer 2011). In addition, these positive emotions and organizational capabilities are best evoked in a space of trust and absence of fear (Rock, 2008; Heskett, 2007).

One proposed way to solve the problem with the lock-in and renew the organization is to separate the old and the new in time and space (Baden-Fuller & Volberda, 1997; Poole & Van de Ven, 1989; Tushman & O’Reilly, 1996; Smith et al. 2010), often known as structural ambidexterity. However, that is not always a viable choice, for instance due to lack of resources or risk of creating conflicts between the old and the new. Instead, renewal needs to happen within the organization, with the old and the new developing side by side. This is sometimes referred to as contextual ambidexterity (Smith et al. 2010). The latter is the focus of this thesis.

So what can be learnt from the traditional thinking about change, relevant for the special case of renewal? How does the change models apply to a context of contextual ambidexterity (Smith et al, 2010), where a climate of innovativeness, learning and creativity needs to be fostered within the existing organization? Reciprocally, what can be learnt from the special case of change that renewal represents, which could complement the traditional change models?

Since decades, the issue of change has been widely discussed in management literature (e.g. Beer et al 1990; Beer & Nohria, 2000; Fredberg et al, 2011; Cady et al, 2014; Dannemiller & Jacobs, 1992; Kotter, 1995; 2008, Christensen, 1997; Christensen & Rosenbloom, 1995; Henderson, 2006; Rothaermel, 2000; Foster & Kaplan, 2001) as well as in practice. One commonly used proposition of how to manage change is the “change formula” (Beckhard & Harris, 1987; Cady et al, 2014). As opposed to some other models, it attempts to take perspective on change covering the system. Thus, in its simple form, the formula discusses how the direction and structure relate to human emotions and motivation. Moreover, it is trying to link different pieces (structural and cultural elements) together, rather than taking them apart. This makes it an appropriate model to use as a basis for the literature discussion, since organizational renewal demands that a whole system is being transformed (Christensen, 1997). The change formula suggests that in order for change to take place, the combined effect of Vision (V), process (P) and dissatisfaction with current state (D) needs to exceed the perceived costs of change (C), thus $V * P * D > C$ for change to take place. Though using different wordings and coming from other angles, these prerequisites for change are common themes in the literature (e.g. Senge, 1990; 1994; Kotter, 1995; 2008; Beer & Nohria, 2000), though many authors focus on one of them at the time. Though the formula has contained somewhat different “letters” over the years (for example, C for costs of change are sometimes replaced by R for resistance) the basic idea has stayed the same.

This licentiate thesis focuses on how successful organizational renewal is organized and managed under the conditions listed above. To do so, a combinations of different qualitative research methods have been applied, with emphasis on action research. My main empirical environment has been a longitudinal study, where a research team followed the renewal efforts of a newsgroup over two year. The action research ingredient was primarily to support seven renewal initiatives, practicing fast cycles of change.

It is, of course, impossible to explore all the change prerequisites in depth in this licentiate thesis. In this thesis the question of how to relate to the creation of a vision or strategy in a renewal context is discussed in the paper “Taking advantage of wider participation in strategy creation: Trust as an enabler in strategy workshops” (Paper 2). The dissatisfaction/desire to change (D) is discussed in relation to the capability to innovate in the paper “The paradox of innovation and urgency (Paper 3). In the paper “Transformation in a tightly nested system: Employing fast cycles of change” (paper 1) a method for change in a renewal environment can be related to the whole change formula.

I suggest a modified version of the change formula, focusing on renewal capabilities and emergent processes while still providing meaning and structure. By this proposed formula, I

hope to contribute to the understanding of renewal and make way for a practice to prevail industry transitions.

The discussion also opens up for new questions and areas for research. The suggested formula is to be seen as a call for future discussion rather than finished proposal. For example, further research could be done to explore and test the relevance of the proposed factors for renewal, quantitatively or qualitatively. Moreover, the question of “how”, focusing of activities and practices is relevant to explore further.

2 Framing my research question

The need for organizations to renew themselves in order to stay competitive increases (Reeves & Deimler, 2011; Burnes, 2004; Kotter, 1996) partly due to industry transition caused by digitalization (Reeves & Deimler, 2011; Nylén, 2015; Barman, 2014; Christensen et al., 2012). Still, most organizations fail to survive major shifts (Christensen, 1997; Christensen & Rosenbloom, 1995). Could that relate to lacking possibilities to deliver upon some of the commonly agreed prerequisites for change, such as clarity of vision and process (Kotter, 1995; 1996; 2008; Cady et al., 2014; Beckhard & Harris, 1987)? In an industry transition, a clear vision or model could be hard to define when the future state of an industry is unknown. Consequently, and a clear process might be just as hard to outline. Moreover, to create a clear process might cause lack of flexibility needed (Sarasvathy, 2001) to continuously adjust the road ahead. A much called for sense of urgency (Kotter, 2008) or dissatisfaction (Beckhard & Harris, 1987; Cady et al., 2014) might trigger the understanding for change as intended, but might also create pressure that inhibit creativity and learning.

The intersections between the commonly suggested, traditional models for succeeding with change (Kotter, 1995; 2008; Beckhard & Harris, 1987; Cady et al, 2014; Beer, 2007) and the knowledge of individual (Amabile & Kramer, 2011; Rock, 2008) and organizational renewal capability (Huy; 1999; 2005; Beer, 2009) provide an interesting dilemma, which is addressed by Huy (1999; 2005). Huy (2005) argues that too much emphasis is put on managing and overcoming resistance, fear and negative emotions evoked by renewal, and to little it put on how to create and utilize positive emotions and organizational renewal capabilities. Indeed, there are many authors discussing how to unlock people's potential and motivation (Cooperrider & Sekerka; 2003; Amabile & Kramer 2011; Cameron et al, 2003; Rock, 2008) as well as organizational renewal capabilities such as creativity (Huy, 1999; 2005; Amabile & Kramer, 2011) and organizational learning (Senge, 1990, Argyris & Schön, 1978). However, the connection between research of managing major change processes and organizational and individual capability is weaker.

As defined in this thesis, organizational renewal means going beyond improvements of merit without the possibility to have a clear vision of the future state. Moreover, the new needs to happen side by side with the old in a case of contextual ambidexterity (Smith et al. 2010). Consequently, the whole system has to change accordingly, which demands renewal capabilities. Traditional change prerequisites, such as the ones presented in the change formula (vision of future state, clear process ahead, dissatisfaction with current state and costs of change/resistance) do not seem to be an adequate guide to help organizations renew themselves to successfully take on the challenge of industry transitions.

I therefore propose the following overall research question: *How is successful organizational renewal organized and led?*

I intend to answer this question by discussing the following sub-questions:

- *What is the role of vision in organizational renewal?*
- *What is the role of clear process in organizational renewal?*
- *What is the role of dissatisfaction with current state in organizational renewal?*
- *What is the role of cost of change in organizational renewal?*

The overall question is what I intend to answer during my time as a doctoral student. It is a too broad question to take on for a licentiate thesis, though. However, I see the need to pose the question about the whole system, not narrowing it down to one or two factors, since renewal demands whole system change (Christensen, 1997; Christensen & Raynor, 2003; Danneels, 2002, 2003; Henderson, 2006). This will mean that I cannot go in depth for every change factor discussed in this thesis.

3 Frame of reference

In this chapter, I will first briefly introduce the field of change. I will then move on to describing renewal as a special case of change. Thereafter I discuss traditional change prerequisites, inspired by the “change formula” (Beckhard & Harris, 1987; Cady et al, 2014) and relate them to the special case of renewal.

3.1 Managing change

Reeves & Deimler (2011) claim that in the business landscape of today, the ability to change and adapt is the only true competitive advantage an organization can have. According to Reeves & Deimler (2011) we live in an era of risk and instability. Moreover, due to for instance globalization and digitalization, the pressure to continuously change and adapt increases (Reeves & Deimler, 2011). Still, most change efforts fail (Beer et al, 1990; Beer & Nohria, 2000; Kotter, 1995). A McKinsey survey (Jacquemout et al, 2015) shows that of all transformation efforts, only 26% are to be considered (by interviewed managers) successes. The percentage of companies falling out of the top three rankings in their industry increased from 2% in 1960 to 14% in 2008 (Reeves & Deimler, 2011).

This, of course, poses an urgent dilemma for leaders around the globe. How could change be conducted in a better way? Consequently, scholars have been preoccupied with the question of change for decades. Organizational change researchers (e.g. Beer et al 1990; Kotter, 1995; 2008; Dannemillar & Jacobs, 1992; Fredberg et al, 2011; Foster & Kaplan, 2001; Christensen, 1997; Christensen & Rosenbloom, 1995; Henderson, 2006; Rothaermel, 2000) have tried to figure out the sequencing (Kotter, 1995; Mintzberg & Westley, 2012), engagement (Beer, 2009), structure (Smith et al, 2010; Beer et al, 1990) and culture (Foster & Kaplan, 2001; Huy, 1999) that will support change. Closely related, scholars of strategy as practice (e.g. Jarzabkowski, 2005; Jarzabkowski, Balogun, & Seidl, 2007; Johnson & Huff, 1998; Johnson, Melin, & Whittington, 2005) have worked to understand the activities of creating and executing a wanted direction. The issue of leadership of change as well as individual’s perception, motivation and capability to change has been frequently discussed also in organizational psychology (see for example Fredrickson; 2001; Lee et al; 2003) and lately neuro leadership (see for instance Rock, 2008; Lieberman, 2013).

3.2 Organizational renewal – a special case of change

Organizational renewal is here defined as a case where change need to happen beyond improvements of merit, where the future state is unknown and where renewal initiatives need to co-exist with the current business. This definition means that not radical change processes or transformation efforts are the issue in this thesis.

To succeed with renewal, organizations need to be changed in its core and as a system. A renewal process, where the future is unknown and the next organizational configuration needs to be created, demands new ideas, new thinking and new behavior. To create an environment that supports that, new ways of working and organizing (Poole & Van de Ven, 1989; Tushman & O’Reilly, 1996, Beer et al, 1990) as well as new capabilities needs to be created (Danneels,

2002). Therefore, renewal can be seen as a special case of organizational change, differentiated from for stepwise change or process improvement.

The issue of how to organize renewal has been discussed for the past decades (Christensen, 1997; Tushman & O'Reilly, 1996 and Smith et al. 2010). It is a difficult question to address, since an organization needs to simultaneously leverage from the old working model and invent the new one. One proposed way, often referred to as structural ambidexterity, is to divide the old and the new in time and space (Baden-Fuller & Volberda, 1997; Poole & Van de Ven, 1989; Tushman & O'Reilly, 1996 and Smith et al. 2010). However, structural ambidexterity is not always the optimal way to go about the renewal challenge for different reasons (and will not be the primary focus of this thesis), for example due to lack of resources, risk of conflicting interests or risk of the new cannibalizing on the old. Instead, the new needs to co-exist with the old (sometimes referred to as contextual ambidexterity, Smith et al. 2010). Thus, renewal processes need to be organized within the organization. Several authors agree that this type of renewal processes needs to be organized differently than the traditional step-wise, often top-down, approach (Beer et al, 1990; Smith et al, 2010, Schaffer & Thomson, 1992; Mintzberg & Westley, 1992). For example, Beer et al. (1990) argues for a unit by unit approach and Schaffer & Thomson (1992) for an approach beginning with creating results in fast cycles.

Whereas for instance Tushman & O'Reilly (1996) and Smith et al. (2010) primarily focus on how to organize renewal, Huy (1999; 2005) discusses emotions and capabilities supporting renewal. Huy (1999; 2005) argues that in order to support renewal and radical change it is necessary to consider the individual emotions and the organizational capabilities. He stresses that emotions creates the organizational capabilities that in turn form the foundation for the new. Hence, instead of seeing emotions as something somewhat troublesome, which is the traditional way according to Huy, he proposes that renewal processes needs to incorporate efforts to foster emotions that facilitate capabilities to adapt, innovate and change. The leaders in a renewal process should strive for creating organizational capabilities such as receptivity to change, the sharing of knowledge, collective action, creativity, and retention of key personnel (Huy, 2005). These capabilities are, according to Huy (2005), connected to emotional states such as authenticity, sympathy, hope, fun and attachment. Authors from different fields discuss how such emotions and capabilities is best evoked (Rock, 2008; Amabile & Kramer, 2011; Higgins, 1997; Kylén, 1999; Senge 1990; 1994; Isaacs, 1999; Fredrickson, 2003). A common denominator is that the absence of fear and presence of trust and perceived safety is essential for positive emotional states to occur.

Arguably, the case of renewal is special. The clear declaration of the future state and consequently the process to get there is lacking. Moreover, going through a transition, industry incumbents need to rethink the whole system to create a renewed configuration. Still, many frequently used frameworks and models for change have not been updated. Below the factors of one of the most commonly used models, the "change formula"(Beckhard & Harris, 1987; Wheatley et al 2003; Cady et al, 2014) serve as a guide through what could be seen as the traditional prerequisites for change, which in turn will be related to reflections from a renewal context.

3.3 Factors of change

One commonly used model, corresponding well with many authors' (Kotter, 1995; Beer, 2007; 2009; Mintzberg & Westley, 1992) discussion about change, is the "change formula". This model is chosen as a guide through the literature because its attempt to simultaneously deal with multiple perspectives of change, just as needed in a case of renewal. The formula was first attributed to David Gleicher in the 1960s. Gleicher himself actually never wrote about the formula, but it was first published by Beckhard & Harris (1977). It has later been published with smaller modifications by different authors (Beckhard & Harris, 1987; Dannemiller & Jacobs, 1992; Wheatley et al 2003; Cady et al 2014). The change formula stipulates that success of a change effort depends on a combined effect of a clear vision/model of future state (V), defined steps in the process (P) and the level of dissatisfaction with current state (D). This combination of forces need to be greater the costs (or resistance) of change (C). Hence, the equation reads that if $V * P * D > C$ change will succeed.

Though going about the issue of organizational change using different wording and points of focus, several authors (Kotter, 1995; Beer, 2007; 2009) agree about these basic factors to make change happen. Therefore, I will go through each of these factors, or prerequisites, for change and review different authors' view on the topic.

3.3.1 Vision of the future state

Many authors state that a clear vision, or model, of the future state is fundamental for creating a new strategy and for a change process to succeed (Beer et al, 2011; Block, 2008; Kotter, 1995; Senge et al., 1994). A vision of a future state is needed when driving change at a more conceptual, overarching level, involving change of the organizational direction and culture (Mintzberg & Westley; 1992). Block (2008) states that no real transformation is achieved without a collective belief, followed by action. According to Kotter (1995), a vision is needed to clarify the direction for change, to motivate people to move in that direction and to coordinate actions across the organization. A vision is needed to create a "collective sense of what is important and why" (Senge et al., 1994, p. 299). The definition from Senge et al. (1994) can be related to purpose (Adler et al., 2011; Dooley, 1997) or shared sense of meaning (Bigley & Pearce, 1998), which put more emphasis on what the organization is created to accomplish than on a model of a future state.

There are, however, some difficulties to discuss regarding the creation of a vision to guide change, especially relevant for a renewal setting. A new vision or strategy could just as well be perceived as a threat by employees (Senge, 1990). This is especially relevant if the values and culture are to be affected by the envisioned state (Trader-Leigh, 2002). Moreover, the work with creating the strategic direction and vision in companies is often criticized for not being innovative enough (Sull, 2004, Hodgkinson et al, 2006) and it is questioned whether a top management team in general has the capability to set an innovative direction. Heskett (2007) discusses the idea of management being responsible for the direction but where the main task regarding renewal being to set the stage for employees to be innovative. Heskett (2007) refers to an interviewed leader, stating that leadership should provide a work environment characterized of openness and trust, to bring out the best ideas for the future.

To succeed with pursuing the corporate vision, Senge (1990) concludes that the individuals in the organizations need to change thoughts and behavior, which requires learning. This in turn is possible when people start caring about something. Fredrickson (2003) describes that both negative and positive emotions have its place when it comes to affecting behavior in a certain direction. However, knowledge creation, creativity and thinking and acting innovatively is not supported by negative emotions such as fear and shame, whereas joy and interest are described as beneficial (Fredrickson, 2001; Lee et al 2003). Higgins (1997) elaborates on the subjects by discussing how human motivation can come from a prevention orientation (avoiding failure) or a promotion orientation (aspire to succeed). Moreover, authors from other fields are stating that in order to be creative and open minded it is important to have the perception of safety and to create a mutual sense of trust (Lieberman, 2013, Robertson et al 2007). Huy (1999, 2005) agrees that positive emotions are important for corporate renewal, since they are essential for creating organizational renewal capabilities.

3.3.2 A clear process ahead

Several authors point to the importance of a set of first steps, or a planned process for moving forward to succeed with change (Beckhard & Harris, 1987; Dannemiller & Jacobs, 1992, Cady et al, 2014). However, that assumes that change is planned from the top (Mintzberg & Westley, 1992). Mintzberg & Westley (1992) discusses different kinds of change processes, where vision, planning and learning are the key themes. They argue that the traditional sequence might be to create vision, plan the change and then learn, but could also start in another end or even bypassing one theme. Hence, those first steps might not be clear and planned from the top, but a result from an emergent practice or inductive learning from some part of the organization. Moreover, Mintzberg & Westley (1992) discuss that change does not always start on the abstract, conceptual level with a vision, but could start with hands-on improvements or ideas in the periphery that the organization gradually picks up. This is consistent with the findings of Beer et al (1990), who claim that corporate renewal is best performed unit by unit further out in the organization, as opposed to top-down programmatic change. Beer et al (1990) argue that renewal cannot successfully be outlined from the top and rolled out in a company-wide programmatic change approach, where change is pushed through the organization from staff or consultant. Instead, they argue, the change needs to happen with clear ownership of line managers, pulling change through the organization by driving change initiatives in the units and learn from them. Adding to that Schaffer & Thomson (1992) argue that change is best achieved by making sure to begin to create real results rather than the planning for change in a grand overall scheme of activities. Additionally, according to Amabile & Kramer (2011), the road towards the future should be characterized by celebration and acknowledgement of progress, to enhance creativity and productivity

In a renewal situation, strategic work is continuously ongoing (Jarzabkowski, 2005), which logically makes a clear process difficult to propose. Clear plans and processes could also limit innovativeness (Sarasvathy, 2001) which might be needed in a renewal setting. Thus, an organization's ability to create a process that allows a strategy and a new way of acting to emerge (Mintzberg, 1978; Mintzberg & Waters, 1985) is central to its ability to survive transitions. Such a process necessarily contains a set of cognitive, structural or procedural

learning mechanisms (Fredberg, Norrgren, & Shani, 2011) through which an organization and its members continuously develop competence and capability.

3.3.3 Dissatisfaction with current state

In the “change formula” (Beckhard & Harris, 1987; Dannemiller and Jacobs, 1992; Cady et al, 2014) not only a future vision of a desired state and a process but also a “dissatisfaction” with status quo is necessary. Some authors have proposed that the D also could stand for “desire to change”. Dissatisfaction with current state is close to what Kotter (1995: 2008) refers to as a sense of urgency and what Conner (1992) calls pain messages. The urgency could be evoked in the organization through various tactics (Kotter, 2008). One tactic could be to leverage a crises to break through complacency, i.e. to clearly demonstrate and communicate the deep trouble that the organization is in as well as what damages that could occur if not immediate actions are taken. Another suggested tactic is to bring data about threats and opportunities from the external context into the organization. Furthermore, Kotter (1995; 2008) stresses that the sense of urgency must come from a message of real importance, such as that change is the difference between success and failure, between survival and death. The logic is that behavior will be changed when there is a real understanding of why it needs to change (Senge, 1990), which is supported by Sandberg & Targama (1998), who state that a real understanding of why and what is essential to motivate sustained change in thinking and behavior.

It is generally agreed that perceived threats as well as perceived rewards affect behavior (Higgins, 1997; Lieberman, 2013). However, there is evidence to suggest that pressure and a perceived threat is limiting the creativity and innovative capability of a person (Higgins, 1997; Lieberman, 2013; Robertson et al., 2007; Amabilie & Kramer, 2011). Pfeffer and Sutton (2000) identify a problem when the pressure gets too high and fear prevents the organization from acting on knowledge. This is consistent with the discussion about defensive routines (Kylén, 1999; Argyris, 1993), which is defined as ways of acting that protect the current way of thinking and doing and hence inhibits the organization and to learning. This is similar to the finding of Higgins (1997), who discusses how a prevention focus leads to behavior to avoid doing wrong whereas promotion focus leads to behavior to succeed. According to Higgins (1997), prevention is a good focus when dealing with questions of for example safety or dealing with danger, whereas promotion is beneficial for aspirational goals. Huy (2005) stresses the importance of bringing about organizational renewal capabilities such as organizational learning and creativity through evoking emotions of fun, hope and sympathy rather than stress or pressure.

3.3.4 Costs of change

In the change formula, the costs of change refers to the human costs, i.e. losses that people perceive as a result of change (Beckhard & Harris, 1987; Beer, 2007). The costs has also been referred to as resistance of change (Cady et al, 2014, Trader-Leigh, 2002). It is the fear of losses that causes the resistance to change (Beer, 2007). Though resistance or costs, are widely discussed there are few clear definitions. Some authors see it as a natural reaction from the organization (Perrin & Megginson, 1996) and some see it as the result of poor, top-down change processes (Beer et al, 1990).

According to Trader-Leigh (2002), change processes in general can expect to encounter resistance. That is particularly true in a change situation where organizational and individual values are threatened (ibid.). The factors underlying the resistance are to a large extent related to emotional aspects such as fear of losing status or their sense of security and professional expertise (Trader-Leigh, 2002). Beer (2007) summarize the fear of losses in three categories; loss involving relationships, rewards and identity. This is consistent with the findings of Rock (2006), who discusses how factors like certainty, status and autonomy guide emotions and behavior and Mabin et al (2001) who stresses factors such as fear of the unknown, fear of losing control and loss of face as contributing to resistance.

Huy (2005) argue that fun, hope and attachment need to be present to enhance the organizational capability to renew itself. This is supported by Amabile & Kramer (2011), who shows that fun is a much better driver for creativity and productivity than pressure. The role of positive emotions for enabling people to think and act in new ways are supported by for instance Fredrickson (2001; 2003). The “broaden and build-theory” (Fredrickson, 2001) suggests that positive emotions broaden one's awareness and encourage novel, varied, and exploratory thoughts and actions. Over time, this broadened behavioral repertoire builds skills and resources, whereas negative emotions prompt narrow, immediate survival-oriented thoughts behaviors.

Moreover, a sense of trust and safety is beneficial for evoking the renewal capabilities needed (Senge, 1990; Heskett, 2007; Rock, 2008). Thus, when discussing organizational capabilities that are needed in a renewal setting (Huy, 1999; 2005) it is clear that the above mentioned underlying resistance are not beneficial.

4 Research methodology

In this section I start by motivating my choices for the overall research approach. Further down I briefly describe my empirical settings and I finish by describing appended papers from methodical point of view.

4.1 Choice of overall research approach

Investigating organizational renewal, a method enabling me to get into the change processes is needed. Consequently, I have chosen a qualitative, primarily longitudinal, approach, following cases over time (Yin, 2009). Moreover, qualitative research methods are appropriate when we want to study things in their natural settings, attempting to make sense of, or interpret, phenomena in terms of the meanings people bring to them (Denzin & Lincoln, 2011) as well as when studying social relations (Flick, 2009). The purpose of the research in this thesis is to learn about the capabilities to renew and innovate in times of industry transitions, fitting the description of Denzin & Lincoln (2011). Thus, the way to learn is in the natural setting, since the only people who can tell the story of what is going on is the people involved in the change, motivating a qualitative approach.

Relating to the perspectives discussed by Burrell & Morgan (1979) my research leans towards the constructivist (looking upon the phenomena as created from perceptions and actions) end of the ontology spectrum (Guba & Lincoln, 1994) and interpretative (making sense of perceived reality) side of the epistemology spectrum. Hence, research presented in this thesis is not aiming to uncovering the truth, but rather to discuss what seems to work in renewal processes. By applying this overall research approach I believe I have achieved a good fit (Maxwell, 2005) between research question and method.

According to Pettigrew (1997) there is a need for more longitudinal research designs (see also Balogun & Johnson, 2004; Beer, 2011; Pettigrew, 1990; Pettigrew, Woodman, & Cameron, 2001; Schein, 1987), especially when it comes to research areas where the understanding of the emerging process is more interesting than the state. Such is the case in studying my research question. Pettigrew (1997) defines a processual analysis as “a sequence of individual and collective events, actions, and activities unfolding over time in context” (Pettigrew, 1997, p.338). When studying a renewal process, where the future is yet to be created, it is relevant to look upon it as a processual analysis, calling for a longitudinal approach.

I have chosen to primarily use collaborative methods, which is appropriate when studying a moving target such as a change process (Balogun & Johnson, 2004, 2005; Beer, 2011; Pettigrew, 1990; Pettigrew, Woodman, & Cameron, 2001; Schein, 1987). Hence, my research question could not be solved by looking at the past. I have based my research on elements of action research, where organizations and researchers create synergies that enhances the relevance of both research and management practice (Shani, et al., 2004; Coughlan & Coughlan, 2002). In action research, the researcher is involved in influencing actions within the context that is studied and learn from those actions (Argyris & Schön, 1978). I take a clinical perspective (Schein, 1987), not striving to be impartial or uninvolved, but rather to explicitly affect the

organization I study. To be able to do so, Schein (1987) points out the importance of trust from the members of the organization and to be helpful, which I have taken into account. In addition, Schein (1987) stresses the importance of learning to understand the reactions from the interventions. To be able to do so, I have continuously written down own reflections as well as reflections from learning sessions with organizations. However, there are limitations with action research. It is hard, or perhaps impossible, to get an unbiased, impartial view. I have tried to balance that drawback by conducting interviews and by being extra thorough to test conclusions with the organizational community.

Dubois & Gadde (2002) describes the intertwined nature of the different activities in a social science research process. They found that a researcher going “back and forth” between theory and empirical observation will get a higher level of understanding. Hence, theory must be understood together with empirical data and the other way around. This way of thinking has guided my research, though not specifically following the concept of systematic combining (Dubois & Gadde, (2002)). Given the nature of my research, where the process is emerging and the outcome of the whole change process is far from given, I have strived to have a research design making it possible to refocus the theoretical framework as well as empirical focus as the understanding of what is going on improves.

4.2 Empirical environment

My research question and choice of overall methodology requires an empirical setting where I can build a long term relationship based on mutual trust. I have had the possibility to form that type of relationship in a research project at a media group focusing on newspaper business. Below I describe their renewal challenge briefly, in order to show why I think it provides me with an empirical environment suited for my research problem.

The media industry in general and the newspaper industry in particular is under severe pressure. By trimming existing models, profits was upheld also as the threat of the internet and mobile devices became apparent. Many companies have now hit the wall with bleeding financials and an unsecure future as a result. The attempts of established newspaper companies to transfer the existing model into the digital environment have been unsuccessful. Few newspaper companies are able to charge for content, and relative to “new” entrants in the news industry such as Google and Facebook, newspapers have lost attention. I have studied a media group that is going through the same dramatic change as most other media companies – due to a technological shift that no media company with a newspaper branch can escape, hence fitting the Yin (2009) rational where a case is a typical case for a specific situation. Moreover, fitting the rational where it is relevant to follow a case over time, following the media group over time is relevant due to the emerging context – where no one actually can predict where we will end up.

In addition, further empirical data I have used draws on learnings from organizations in need of renewing their direction, strategy or vision of their future state. Moreover, these organizations identified that they were in need of broadening their innovative capability and therefore invited people outside the management team to contribute. As a consultant and action

researcher I followed 28 strategy/vision workshops to learn what was needed to make a co-creational approach to creation of future state work.

4.3 Data collection and analysis

The methods used in the three appended papers are briefly described below. In each of the appended papers, the data collection process is more thoroughly outlined.

Paper 1: Action research study in the newspaper industry in the midst of an ongoing industry transition. Three initiatives were followed over time, to learn about how contextual ambidexterity challenges could be organized to produce organizational renewal. The action research was complemented with semi-structured interviews.

Paper 2: Action research study where 10 strategy processes and 28 workshops were followed, to learn about how a workshop setting could be managed to spur innovativeness and to use the collective capabilities of the participants. The action research component was complemented with ongoing conversations with stakeholders, through both interviews and meetings. Though this paper is narrow in terms of its focus on workshops, I intent to open up the space for forthcoming work to take these findings into the more generic challenge of creating ongoing conversations between different stakeholders about the future of an organization.

Paper 3. Action research study in the newspaper industry, where seven initiatives were followed over time, investigating how the potential paradox of innovation and urgency could be resolved in a case of renewal and industry transition.

The data for the three appended papers are collected primarily through action research. However, in all papers, the action research component has been complemented by interviews and reflective meetings. In the below table, the data collection methods are outlined.

Paper	Action research component	Number of interviews	Number of learning meetings
Paper 1: Transformation in a tightly nested system: Employing fast cycles of change	The research team supported three different cases of renewal initiatives, each stretching over three months.	8	11
Paper 2: Taking advantage of wider participation in strategy workshops: Trust as an enabler	The researcher supported 10 different strategy processes, and took part in 28 strategy creation workshops.	22	10
Paper 3: The paradox of innovation and urgency	The research team followed seven different cases of renewal initiatives, each stretching of three months and over a period of 18 months in total.	14	25

Table 1: Data collection methods for appended papers

The data for each paper was analyzed as an ongoing process. During full-day reflective sessions within the research teams, the notes and learning logs were synthesized. The data was grouped into emerging themes, and interpreted for meaning, as suggested by Taylor-Powell & Renner (2003). The findings were then tested with the organizations studied, through workshops, where the researchers presented preliminary findings for feedback.

4.4 Issues of research quality

The traditional ways of determining research quality is to evaluate reliability, replication and validity (Bryman & Bell, 2007; Flick, 2009). However, all the quality parameters above were developed with quantitative research in mind. Therefore, some alternative parameters for qualitative research have been discussed. Lincoln & Guba (1985) are proposing trustworthiness as a criterion for assessing research quality. Furthermore, they propose that this criterion is built up from four aspects – credibility, transferability, dependability, confirmability - each corresponding with the traditional aspects.

Credibility corresponds to internal validity, reflecting how believable the findings are. Following guidelines presented by Shenton (2004), I have strived to achieve high credibility. For example, as Shenton (2004) suggests, I have continuously written up findings and reflections in a learning log. I have also spent a lot of time on the field, getting to know the empirical environment. Moreover, I have used triangulation as discussed in Jick (1979), collecting data from many parts of the organizations as well as from many levels in the organizations. All quotes I have used have been sent for validation and preliminary results have been presented in workshops, securing a high degree of respondent validation.

Transferability parallels to external validity, answering the question of to what extent the findings are applicable to other contexts. Focusing on renewal, the opportunities for transferability into different sectors and industries should be vast. Dependability relates to reliability. To make comments on the dependability of a qualitative study, the researchers' process of conceptualizing the study, collecting the data, interpreting the findings and reporting result is evaluated (Lincoln & Guba, 1985; Shenton, 2004). One way to look at it is to view the research design as a prototype that could be evaluated and tested by future researchers. As a response to this I have tried to continuously document and the process. Moreover, the method used in paper 1 and 3 have already been used in other context, which should indicate the method is dependable. Confirmability parallels to objectivity, reflecting upon to what extent the researcher has let his or her own values and beliefs interfere with the research process. Participatory research is by definition not objective as stated by Schein, 1987, describing a clinical perspective. Hence, the way to deal with confirmability will not be to take the subjectivity out of the equation, but to be open and clear about the process, the beliefs and preconceptions. For instance, I have a preconception that organizations in general are not using the full potential of their employees. In the preface of this licentiate thesis I outline some values and preconception that might have influenced my research.

The ongoing debate about rigor versus relevance is yet to be resolved. However, there are researchers that are trying to put this polarization to rest (Hodgkinson & Rousseau, 2009; Gulati, 2007), emphasizing the need for both perspectives. When it comes to qualitative research in general and my research field in particular it seems like it is general practice to start with the problem, hence the relevance. The rigor is built in the process through careful planning and documentation.

5 Appended papers

5.1 Paper 1

Title: Transformation in a tightly nested system, employing fast cycles of change

Abstract: A reason why industry incumbents seldom survive technology transitions is their strong reliance on an efficient, but inflexible organizational system. We studied three digital transformation initiatives that created fast progress in a struggling newspaper group by working against the industry logic and established thinking in the area. The paper argues that management succeeded in introducing a new strategic practice through these transformation initiatives. We focus on three factors contributing to the success: complexity management, short time development of a long term vision, and the introduction of impossible goals.

Contribution: This paper suggests a structure for organizing contextual ambidexterity issues in fast cycles of change. In the paper it is argued that the setup of the projects provided the organization with a shortcut to overcoming the lock-in created by the organizational fit (Christensen, 1997; Christensen & Raynor, 2003; Danneels, 2002, 2003; Henderson, 2006). The projects were designed to have some clear features: the time limit was set to three months; project teams included members from all relevant departments, but were kept as small as possible and the scope of the task was reduced, but performance demands far exceeded what was currently seen as possible. In the paper we argue that these specifications gave room for managing some of problems with traditional change factors in a renewal context. The lacking broad vision was substituted for a narrow and clear one in the projects. The lack of clear process ahead was compensated both through the clarity in the projects and by the sense that the projects build the road ahead. The sense of urgency was clearly present overall but the extremely ambitious goals within the projects provided the teams with a sense that they could not lose, only win and thereby released the pressure.

5.2 Paper 2

Title: Taking advantage of wider participation in strategy workshops: Trust as an enabler

Abstract: The purpose of strategy workshops commonly relates to creation of direction. However, previous research shows that this purpose is not always met. This is problematic, since strategy workshops are considered a critical feature of the strategic planning process, widely used and often costly. Several authors stress that lack of diversity is a problem for creation of direction and that adding more voices to the strategic conversation could be one way to solve it. Thus, a way to approach the problem is to invite a wider circle to participants. Logically, in order to make use of the broader participation the ability and commitment to voice opinions and ideas should be crucial. However, to create a climate of trust, where ideas are freely expressed and challenged in such a setting is easier said than done.

The empirical findings from 10 strategy processes and 28 workshops in this paper suggest some areas of focus for setting up and executing strategy workshops with wider participation. These

parameters could have a pivoting role in creating the trust needed for the wider participation in strategy workshops to actually pay off.

Contribution: Strategy workshops could be an efficient tool to create the necessary interplay between top and bottom in the organization (Jarzabkowski, 2005; Beer & Eisenstat, 2004), if properly prepared and communicated. The paper suggests that affective trust, comprising benevolence and integrity (Mayer et al, 1995) is an underused area of focus when trying to utilize the collective creativity and wisdom of the organization for creating the vision, strategy or model of a future state. .

Each of the three focus areas proposed in this paper - opening up the conversation, clarity of participative process and delivering upon honest intent – needs further investigation. Moreover, how these finding potentially could be transferred outside the strategy workshop setting into a more general question of creating possibilities for the organizational community to engage in ideating for the direction of the organization should be of interest.

5.3 Paper 3

Title: The paradox of innovation and urgency

Abstract: The idea that change efforts demand a sense of urgency is fundamental to many prescriptive change models. The purpose is to create energy and uproot established behaviors, with the idea that change can take place more easily under such conditions. It is not clear that a sense of urgency supports creativity and ability to innovate, however. Indeed, studies indicate that pressure may lead to less creativity and a focus on reducing errors instead of supporting progress. As authors in the change management field almost univocally support a sense of urgency as an important success factor, there seems to be a paradox at hand: urgency both supports change and inhibits it. A lingering question is how this paradox can be resolved. The paper builds on an action research study of seven change initiatives at a large media company which was undergoing a serious crisis. The researchers set up the initiatives together with the organization to study the dynamics of creating innovative change under pressure. The study found that the dynamics in the team changed from one of stress and anxiety to energy and creativity under certain conditions. The paper discusses these findings in relation to the existing literature in the area.

Contribution: The paper contributes by discussing the conflict between potential pressure created by a sense of urgency (Kotter, 1995) and innovation can be resolved. The potential conflict is outlined conceptually and a possible way to think of a solution is illustrated with a case in the media industry. In the case, projects were set up by deviating from the traditional model of setting realistic goals (Doran, 1981) by instead setting “unrealistic” goals that no team actually was expected to achieve. This model seemed to be a way of turning pressure into energy instead of friction.

6 Discussion

In an industry transition, for example due to digitalization, organizations need to be renewed to survive. In this thesis, organizational renewal is defined as a process going beyond improvements of merits, where the future configuration is unknown and where the old and the new need to happen side by side. The renewal process then needs to take the whole system into account (Beer, 2009) and find a new configuration. New activities need to be organized differently and the core processes of the organization might change (Christensen, 1997; Henderson, 2006). This in turn puts new demands on needed capabilities (Beer, 2009) and a cultural lock-in needs to be overcome (Foster & Kaplan, 2001). Moreover, to succeed with the renewal effort as such, renewal capabilities such as learning and creativity need to be fostered (Huy, 1999; 2005).

6.1 Organizing for organizational renewal

In the cases I have studied, to separate the old from the new in time and space has not been a viable option (structural ambidexterity). Instead, the organizations have had to rely upon their ability to create the new within the existing context, sometimes referred to as contextual ambidexterity (Smith et al, 2010). It could be hypothesized that renewing in a case of contextual ambidexterity is practically harder than in a case of structural ambidexterity. When the new is separated the logic of a “start-up” and entrepreneurship easily come in play. In a case where the renewal process has to be managed within the existing context, the logic and tools managers have at hand is leaning more towards the traditional change factors. Hence, they have to take the organizational internal and external context into account (Beer, 2009), while simultaneously encouraging the creation of the new.

How to organize for renewal is discussed in Paper 1, proposing a structure for approaching the renewal challenge. How to encourage the creative, innovative and entrepreneurial capability, needed in a renewal setting (Huy, 1999; 2005), is discussed in different ways in all appended papers. The findings point towards the necessity to create a safe micro-environment, where the overall pressure is turned into energy. In paper 1 and 3, this was done through a project structure with very high targets and short time frame in combination with a sense of meaning and trust. In paper two, the creative capacity in strategy workshops was found to be brought out when conveying trust through for instance honesty and respect.

6.2 Discussing factors of change in relation to renewal

In this thesis the change literature is outlined through the change formula ($V \cdot D \cdot P > C$) (Beckhard, 1975; Beckhard & Harris, 1978; 1987; Dannemiller & Jacobs, 1992; Wheatley et al 2003; Cady et al 2014). This is due to the fact that the formula discusses factors representing several parts of an organizational system, making it relevant for thinking about system-wide change and renewal.

6.2.1 The need for a vision when the future is unknown

The need for a vision or model of a future state in a change process is for many authors clear (Kotter, 1995; Senge, 1990; 1994; Beckhard & Harris, 1978). Even authors stressing a more

bottom-up approach (Beer et al, 1990) often argue that the overall vision must be clear and originate from management. However, this is often problematic in the special case of renewal. In the newspaper industry, discussed in paper 1, no incumbent in the industry had a clear view of what the future configuration will look like. Hence, to provide the organization with a compelling vision, guiding the organization towards what is important and why (Senge, 1994), beyond survival, was simply not possible. This called for the organization to find ways to let the future emerge, consistent with the findings of Mintzberg, 1978; Mintzberg & Waters, 1985) and for the strategy process to be continuously ongoing (Jarzabkowski, 2005). In the simple structure for managing renewal in case of contextual ambidexterity (Smith et al, 2010) proposed in paper 1, a way of driving projects encompassing the complexity of the renewal challenge is outlined. The findings point towards that a missing overall vision could be traded for a narrow, clear target in the near future, presuming that the target is connected to the emerging strategic agenda. However, to use the work with short-term targets as a way to continuously create the model of the future state requires capability to learn (Beer, 2009, Senge, 1990). Beer et al (1990) put forward a unit-by-unit model for corporate renewal, where the change activities take place in the units and successes being spread through the organization. This could be seen as a similar thinking, but the change activities are not concentrated to a unit, process or function, but to whole system is challenge, simplified to a very clear target.

The project structure proposed in paper 1, involves high potentials (selected by management for potentially being the next generation of leaders) working in close connection to the management to solve short term issues while providing learning to shape the model for the future. This can be seen as a way for management to connect with parts of the broader community to engage in the vision, strategy and future state. This is, according to several authors, crucial for success (Liedtka, 1996; Senge, 1990; Beer et al, 1990; Beer, 2009; Jarzabkowski, 1995). Some authors stresses the possibility of connecting with a broader set of people, not only to learn and accept the strategic direction of the organization, but also to be part of creating the ideas for the future direction (Isaacs, 1999, Mintzberg & Westley, 1992, Heskett, 2007). This is particularly relevant in a case of renewal. Paper 2 discusses how leaders can make use of the collective creative and innovative capability of a wider circle in the organization, hence reaching outside the management team to create ideas for the future, vision and strategy. In the paper it is suggested that a sense of trust needs to be present (or absence of fear), to make use of creative capabilities. This is consistent with the findings of for example Isaacs (1999); Heskett (2007), Rock (2008) and Amabile & Kramer (2011). Paper 2 concludes that the pivoting factors for trust to occur and hence maximize chances for people to creatively think together has less to do with rational, analytical factors and more to do with emotional, relational (such as perception of being respected and listened to, perception of being safe) factors. Though the study in paper 2 is limited to the context of strategy creation workshops, it could be explored how these findings transfer to other situations within an organization, where the voice of the crowd is sought to challenge current direction or create ideas for a renewed future state.

6.2.2 A clear process that needs to be emergent

A clear process, or a first set of clear steps towards a common future, is commonly suggested as key for successful change (Beckhard & Harris, 1987; Dannemiller & Jacobs, 1992; Cady et al, 2014). In a renewal context, however, it is hard to deliver upon that suggestion. When the future configuration is unknown, as in industry transition (Christensen, 1997; Christensen & Rosenbloom, 1995), clear steps ahead might harm flexibility (Sarasvathy, 2001). Instead, an emergent process has to be created (Minzberg, 1978). However, a clear process provides the organization with stability, trust and clarity, which is important for unlocking renewal capabilities (Huy, 2005) creativity and innovativeness (Rock, 2008, Amabile & Kramer, 2011) as well positive emotions (Amabile & Kramer, 2011, Fredrickson, 2003).

In the case of renewal, organizations need all the renewal capabilities they can get. How to solve this paradox, to provide a process for stability and clarity while allowing flexibility is discussed primarily in paper 1. In the paper a possible solution to the paradox is suggested. The short term project, with a simple structure, clear targets and steps, provides the clarity, stability and focus, whereas the possibility to use the learning from each project to reconstruct the road ahead provides the flexibility. This way of thinking can also be connected to the progress principle, where Amabile & Kramer (2011) argues for continuous celebration and attention to small wins to create creative and productive workplace. Moreover, this could be related to the thinking of Schaffer & Thomson (1992), discussing to drive change through beginning with results.

6.2.3 Dissatisfaction with current state without fear

An often used argument for successful change is the needed sense of dissatisfaction with the current state, thus a sense of urgency (Beckhard & Harris, 1987; Cady et al, 2014; Kotter, 1995; 1996, 2008; Conner, 1992). Some authors discuss if the D for dissatisfaction in the change formula ought to be changed to D for desire to change in order to get a more positive and engaging streak. It could be argued that the latter is to be preferred in a renewal setting, which is discussed in paper 3. As argued by Huy (1999; 2005), the organizational renewal capabilities are connected to evoking positive emotions such as fun, attachment and hope. This is supported by Amabile & Kramer (2011), who shows that pressure and stress are not as beneficial for creativity and productivity as the sense of fun and achievement, as well as Rock (2008) and Lieberman (2013) who discuss how the human brain loses its ability to be creative, innovative and logic when posed to a perceived threat.

In paper 1, the project structure proposed is a suggested way to resolve the tension between need urgency and innovation. Arguably, the challenges were set up and formulated to keep the pressure (and motivation) from the overall sense of urgency while releasing the perceived stress. Paper 3 digs deeper into what could be a higher level solution for the paradoxical tension between urgency and innovation Through setting unreasonably high targets, which no project team could be expected to reach, the data indicates that the team members perceived that they could not loose – only win (in paper 3 referred to as the success-failure relationship). Hence, deviating from the traditional model of setting goals designed to be reachable and realistic (Doran, 1981) seems to be a way of turning pressure into energy and motivation instead of fear

and friction. Moreover, management was able to create trust (referred to as trust-engagement relationship) and helped the teams to engage in the short term goals even if the long term vision was lacking (referred to as the short-term-long-term relationship).

6.2.4 Emotions as costs or assets

Cady et al (2014) are specifically calling for further investigating about how the C (cost) in the change formula play out. It has been a long known “truth” that people in general do not like change and that change efforts indisputably means human costs and resistance (Beckhard & Harris, 1987; Dannemiller & Jacobs, 1992, Cady et al, 2014; Perrin & Megginson, 1996). In the change formula, as in other change models (Kotter, 1995; 1996), the resistance stemming from perceived losses, is something that needs to be overcome. The resistance needs to be handled by strengthening the other factors of change such as vision, dissatisfaction with current state or process. However, Huy (2005) argues that more emphasis should be put on how to manage renewal and change supported by positive emotions, which in turn leads to organizational renewal capabilities, instead of only focusing on how to manage change despite human emotions, fear and resistance.

Findings in all appended paper points towards the necessity to create an environment of emotional safety and a promotion approach (Higgins, 1997), in order to utilize the renewal capabilities of people. In paper 1, it is described how the team members felt that they could not lose, only win, which made the ideas for the future start coming. Paper 3 describes how simple measures, evoking emotional trust, enhanced the quality of the conversation and the creative output. It could be hypothesized that managing transformation with stronger links to features like trust, creativity and positive emotions could reduce that sense of “costs”, leading to an acceptance of a weaker vision and process. This could be of special importance in the case of organizational renewal, hence suited to apply to industry transitions or radical shifts where the vision of the future state is generally weak (Christensen, 1997; Christensen & Rosenbloom, 1995).

In the table below, I briefly summarize the problems with traditional change prerequisites, represented by the change formula, relating to renewal.

Change factor	Problem in the special case of renewal	Renewal implications
Vision of future state (V)	<ul style="list-style-type: none"> A clear vision of the future state is hard to outline A renewed model of the future might cause fear 	<ul style="list-style-type: none"> Need for creating hope and meaning Need to allow the future to emerge
Clear process ahead (P)	<ul style="list-style-type: none"> When the vision is blurry it is hard to outline a clear process Clarity of process might cause rigidity 	<ul style="list-style-type: none"> Need for flexibility Need for sense of accomplishment and progress Need for emergent process
Dissatisfaction with current state (D)	<ul style="list-style-type: none"> Dissatisfaction, sense of urgency or pain messages might cause stress and fear, detrimental for creativity, learning and collaboration 	<ul style="list-style-type: none"> Need for a promotion focus rather prevention to release renewal capabilities Need to provide understanding of importance
Costs of change (C)	<ul style="list-style-type: none"> People’s resistance to change as well as negative emotions are taken for granted Negative emotions inhibit ability for renewal 	<ul style="list-style-type: none"> Need to support positive emotions and renewal capabilities

Table 2 Change factors in a renewal context

6.3 Towards a formula for renewal

In the special case of change that organizational renewal represents, there are clear indications that change needs to be organized differently (Smith et al, 2010). When separating the old and the new in different entities is not possible, the renewal activities need to take place within the current organizational system. How the traditional thinking about change apply is such a special case is the overall issue of this licentiate thesis. I argue that traditional change thinking indeed bring value to the discussion about organization renewal. However, I suggest that further research needs to be done to respond to the renewal implications outlined in table 2. As a starting point for a further discussion I propose some moderation and clarification of the change formula, which I argue will make it more relevant in a renewal context.

In a renewal context, I propose that the need for a vision means more “a collective sense of what is important and why” (Senge, 1994, p. 299) and less of a clear view of a future state (Kotter, 1995). Something meaningful to unify people is important to mobilize effort (Huy, 2005) and to create relatedness (Rock, 2008). This collective sense of what is important could be connected to operating with a clear and higher purpose (Beer et al 2011; Beer, 2009) and the positive effects of inviting people to take part in something meaningful (Senge, 1990). Thus, I argue that in case of renewal, when the future is unknown and hard to model, it still important to create a sense of meaning a through being aligned on purpose. Hence, I suggest: *V for vision* → *P for purpose*.

Furthermore, following the difficulty with modelling the vision clearly, the traditional prerequisite of a laying out a clear process for the change ahead is hard to deliver upon in a renewal context. However, in my research I find evidence that people can do without a ready-built road to the end station (discussed in paper 1 and 2). Instead, I propose, they need clarity (Rock, 2008) of what to do in the near future and a sense of being on the right track in a process that emerges (Minzberg & Waters, 1975; Jarzabkowski, 2005). This is also consistent with the thinking about the power of small wins and the progress principle (Amabile & Kramer) and with the idea that change needs to begin with results (Schaffer & Thomson, 1992). Therefore I propose, that the P for process in a renewal context should stand for progress instead, thus *P for process* → *P for progress*.

In an industry transition, where organizational renewal is needed, the collective sense of the importance of the change ahead is at least as important as in a more traditional change process, considering the magnitude of the change that needs to happen. However, as argued by Trader-Leigh (2002) change is harder when values and culture are affected, and the risk of fear and resistance increases. I argue that in a renewal setting, where organizational capabilities such as creativity (Huy, 2005), and learning (Senge, 1994; Beer, 2009) is needed, understanding of the urgency throughout the organization should be conveyed in a manner that elicit hope (Huy, 1999) and future rewards (Higgins, 1997; Rock, 2008) rather than a threat (Higgins, 1997). To organize a safe space in which people perceive that they cannot fail (as discussed in paper 1 and 3) will free up the solution space and turn pressure into energy instead of friction and fear. Consequently, I propose that focus in a renewal formula should be to create desire rather than dissatisfaction, *D for dissatisfaction* → *D for desire*.

In the change formula, as in most change models, the need for taking human emotions, thoughts and perceived costs of change into account is proposed. However, the human perceived costs of change and resistance are often seen as more or less inevitable (Mabin et al, 2002). As argued by Huy, (2005), there is not much emphasis on how to encourage positive emotions supporting change. Finding evidence from various authors about the importance of trust, safety and positive emotions (Amabile & Kramer, 2011; Isaacs, 1999, Rock, 2008; Cooperider & Whitney, 2000) and their connection to organizational renewal capabilities such as creativity, learning and receptivity to change (Huy, 2005), I propose to add focus on renewal capabilities to the formula. Focusing on renewal capabilities as suggested by Huy (1999, 2005) will lead to work to lower costs of change. Therefore, I argue that the costs of change is not something inevitably causing resistance that should be overcome, but rather consisting of human thoughts and emotions that should be a natural part to encompass when managing renewal processes. I therefore suggest that the *renewal capabilities (RC)* should be placed on the left side of the equation, indicating that there is work to be done there for any leader who wants to pursue renewal.

Hence I propose a renewal formula: $P*P*D*RC = \textit{Renewal}$

This is, of course, an early draft of a model or formula for renewal and more in-depth research needs to be conducted. Further research needs to be done to question and refine the proposed formula as well as to define and test the constructs. Moreover, to contribute to a strategic practice (Jarzabkowski, 2005; Jarzabkowski, Balogun, & Seidl, 2007; Johnson, Melin, & Whittington, 2005), research needs to be conducted to explore what actions that could be taken to put the formula to work. This licentiate thesis says little about how the proposed constructs could be created, in practice.

This thesis an attempt to increase the understanding of renewal and contribute to literature on organizational change (Beer et al, 1990; Beer & Nohria, 2000; Fredberg et al, 2011; Kotter, 1995; 1996; 2008; Cady et al., 2014) and spark a discussion that could lead towards a practice of prevailing industry transitions. Moreover, I make the proposition to declare where I intend to go next. Indeed, this licentiate thesis represents not so much an end of a process as a beginning of my doctoral thesis.

7 References

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