Embedded Self-Managing Modes of Organizing
Empirical Inquiries into Boundaries, Momentum, and Collectivity

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To all the so-called troublemakers,
effecting change from the inside

Foreword

Quitting a secure and interesting job to go back to university was not a decision I took lightly. Two pieces of advice from that time stuck with me, even though I cannot recall who shared them with me. First, a deep passion for a topic is the only truly good reason for pursuing a PhD. For, and this was the second piece of advice, what differentiates those who end up with a PhD from those who do not is not a superior intellect but mainly their superior willingness to sit in front of a screen. I am not particularly fond of sitting in front of a screen for long, I find it very difficult actually. What I found easy was to find the passion for my research topic. I am fascinated with it to this day. It is a gift to have found this niche for myself and to be (currently) fortunate enough to earn a living while learning more about a topic I love. Yet, besides a passion for a topic, it is the people who share it with you and help you along the way who make (or break) the PhD experience. My words won't do justice to the gratitude I feel, and I will probably forget someone; but let me try to express it.

My supervisors Dennis Schoeneborn and Markus Reihlen, thank you for your unwavering support from day one. I still remember the first phone call with Dennis in September 2018 and the first meeting among the three of us in Lüneburg a while later. So much has happened since! I admire your curiosity, kindness, and optimism. Dennis, as my first supervisor, you taught me the ins and outs of "the craft" and what it means to be an academic. I am grateful for everything I learned from you and for your tireless dedication throughout the entire project. Thank you for sharing your fascination for new forms of organizing and your theoretical ideas with me. Our discussions always challenged me to be more precise and to get to the bottom of the argument. Thank you for caring so much! Markus, thank you for supporting this project from the start. For hosting me in Lüneburg during my research stay and making me feel so welcome. For helping me navigate the challenges of collecting data during a pandemic. For your unparalleled enthusiasm, which is truly a gift.

Thank you to the academic communities I was a part of during the past years. The COG cluster at Copenhagen Business School for the feedback on my work and for supporting my data collection financially. The LOST Group at Leuphana University of Lüneburg – thanks for being so welcoming. For the thought-provoking discussions and for all the advice you shared. In that context, a special thanks to Hannah Trittin-Ulbrich for allowing me to continue my research at Leuphana University in the future.

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Thank you to my fellow PhDs at MSC and to those visiting. It's been a ride! For the laughs and the tears we shared, for the campfire songs we sang in the office, and for creating the (objectively!) best PhD environment at CBS. Amanda, Doro, Jesper, Kerstin, Leonie, Milena, Robin, Sara, Sarosh, Tali and many more. A special thank you to Henrik, Daniel and Sofie for helping me with the Danish abstract. Finally, the Chapel, my office mates and support system from day one: Laura, Pernille, Sofie, and Frederik. Your trust and understanding meant the world.

To the colleagues who became friends. Verena Girschik, you were my friend at the department before we became co-authors and I am so grateful for both. Thank you for showing me how to make academia work for me and how not to buy into all the noise – literally and figuratively. Ellen Nathues, I admire your badassery and kindness – thanks for being there. Thank you for the emotional and practical support to the queer/feminist gang I found in and around CBS: Kai Storm, Lea Reiss and Bontu Guschke. To Sine Nørholm Just and Sara Louise Muhr who brought us all together. Thank you for taking me (and so many others) under your wings. And for your kindness and your advice.

I also want to thank the wonderful and incredibly professional admin unit at MSC who always made everything work. A special thanks to Majbritt Vendelbo, Lisbeth de Thurah and Lise Søstrøm for their patience, savviness, and unwavering support.

To my informants in my different empirical contexts. I am forever thankful for your generosity throughout this project. It would – quite literally – not have been possible without your inspiration and your perspective. I sincerely hope that some of what I found out will be useful to you. A special thank you to my former colleagues and superiors. You know who you are. Thank you for inspiring this project and thank you for making it possible.

Thanks to the wonderful friends who were here before I embarked on this marathon. My friends from good old Berlin times: Annika, Phoebe, I feel so at ease with you and love our endless discussions about lesbian culture; Lian, Gemma, you are equal amounts hilarious and sensitive and I thank you for the laughs and the football we shared, for the dad jokes and memes, but also your great hugs. I thank my Kassel friends

Abstract

This dissertation empirically examines self-managing modes of organizing (SMOs) embedded within hierarchical contexts of established organizational settings. Although SMOs in various forms have long been experimented with in practice and extensively explored in research, realizing the promised potential of SMOs remains a complex challenge. Fundamental questions regarding how best to introduce such modes of organizing and how to sustain them over time still present a puzzle for researchers and practitioners alike. These challenges are particularly complex in the context of established organizations experimenting with self-managing and participatory modes of organizing since sustaining SMOs embedded within traditional hierarchical settings inevitably generates tensions and paradoxes. In exploring these questions, I adopt a constitutive approach that emphasizes how organizational phenomena are continuously renegotiated through communication. Proceeding from this perspective, the three papers of this dissertation delve into three aspects of embedded SMOs.

Paper I, entitled *A constitutive paradox view of boundary work: How self-managing modes of organizing within hierarchical organizational settings can be sustained*, approaches the question of how to sustain embedded SMOs by conceptualizing this challenge as a matter of constitutive paradoxical boundary work. In highlighting the importance of boundary work, this first paper adds to the literature on SMOs while also adding to the literature on boundary work by showing how paradoxes are not merely a side effect of such work but can play a constitutive role in sustaining (intra-)organizational boundaries.

In Paper II, entitled *From fleeting enchantment to embodied commitment: How bottom-up momentum can emerge and persist*, again applies a constitutive view to expand upon the concept of "momentum" in the context of introducing and sustaining SMOs. This paper contributes to the theorization of momentum by evidencing and elucidating the role of what I call "embodied commitment" in perpetuating momentum to sustain embedded SMOs, especially from the bottom up. The findings further highlight how the emergence of new meanings can shift momentum away from the path originally intended by the initiators of SMOs.

Paper III, entitled *Cultivating dispersed collectivity: How community participation matters for employee activists*, is positioned at the nexus of employee activism and alternative forms of organizing. This paper explores how the participation of employee

activists in communities located outside of their companies, but which center on a shared social purpose, shapes how these employees experience their change agency. This in-depth qualitative study contributes to the literature on employee activism by offering a nuanced view of the potentialities and limitations of inter-organizational communities for mobilizing and sustaining their members' employee activism.

My PhD thesis makes two overarching contributions to organization scholarship. First, the dissertation contributes to ongoing discussions about issues of democratic forms of organizing more broadly with findings from contemporary and foundational empirical research. These findings evidence how employees may come to view self-managing and participatory modes of organizing as an opportunity to claim more participation and decision-making authority, thereby revealing how efforts to introduce and sustain SMOs hold potential for engendering forms of democratic participation not initially intended or envisaged by those responsible for their inception. Second, the constitutive view I apply throughout this doctoral project contributes a new understanding of how embedded SMOs can endure in spite of their inherently paradoxical setup. In particular, my analysis from this perspective reveals how alternative modes of organizing can be (re)produced alongside prevailing hierarchical modes by showing that the inherent paradoxes and tensions of embedded SMOs can themselves become co-constitutive of alternative modes of organizing as these tensions are negotiated through the continuous meaning-making processes of actors engaged in co-constructing and sustaining embedded SMOs.

Resumé

Denne afhandling undersøger selvstyrende organiseringsformer (SMO'er), der er indlejret i hierarkiske sammenhænge i etablerede organisationer. På trods af at organisationer igennem længere tid har eksperimenteret med forskellige former for SMO'er, og at disse har været genstand for omfattende forskning, er det fortsat en kompleks udfordring at realisere det lovede potentiale af SMO'er. Grundlæggende spørgsmål om, hvordan SMO'er bedst introduceres og opretholdes over tid udgør til stadighed en udfordring for såvel forskere som praktikere. Udfordringerne er særligt komplekse i etablerede organisationer, der eksperimenterer med selvstyring og deltagelsesbaserede organiseringsformer. Dette skyldes, at opretholdelsen af SMO'er der indlejres i traditionelle hierarkiske strukturer uundgåeligt skaber spændinger og paradokser. I undersøgelsen af disse spørgsmål anvender jeg en konstitutiv tilgang, der lægger vægt på, hvordan organisatoriske fænomener kontinuerligt genforhandles igennem kommunikation. Baseret på dette perspektiv undersøges tre aspekter af indlejrede SMO'er i de tre artikler i denne afhandling.

Artikel 1, *A constitutive paradox view of boundary work: How self-managing modes of organizing within hierarchical organizational settings can be sustained*, fokuserer på spørgsmålet om, hvordan man opretholder indlejrede SMO'er ved at konceptualisere denne udfordring som konstitutivt paradoksalt "boundary work". Ved at fremhæve betydningen af "boundary work", hvormed organisatoriske grænser forhandles og opretholdes, bidrager afhandlingens første artikel til litteraturen om SMO'er og boundary work ved at vise, hvordan paradokser ikke blot er en bivirkning af sådanne praksisser, men også kan spille en konstitutiv rolle i opretholdelsen af (intra-)organisatoriske grænser.

Artikel 2, *From fleeting enchantment to embodied commitment: How bottom-up momentum can emerge and persist*, anvender igen en konstitutiv tilgang for at udvikle begrebet "momentum" i forbindelse med etableringen og opretholdelsen af SMO'er. Denne artikel bidrager til teoriudviklingen om momentum ved at påvise og belyse rollen af det, som jeg kalder "kropsliggjort engagement" ("embodied commitment") til opretholdelse af momentum for at støtte indlejrede SMO'er, især nedefra og op. Mine forskningsresultater klarlægger desuden, hvordan fremkomsten af nye forståelser kan flytte momentum fra den kurs, som initiativtagere til SMO'erne oprindeligt havde til hensigt.

Artikel 3, *Cultivating dispersed collectivity: How community participation matters for employee activists*, opererer i skæringspunktet imellem medarbejderaktivisme og alternative organiseringsformer. Denne artikel undersøger, hvordan deltagelse i fællesskaber uden for virksomheden, hvor medarbejderaktivister deler et fælles socialt formål, påvirker måden hvorpå disse medarbejdere oplever deres evne til at skabe forandringer. Denne dybdegående kvalitative undersøgelse bidrager til litteraturen om medarbejderaktivisme ved at frembringe et nuanceret syn på potentialer og begrænsninger ved interorganisatoriske fællesskaber etableret med henblik på at mobilisere og opretholde medlemmernes medarbejderaktivisme.

Ph.d.-afhandlingen yder to overordnede bidrag til organisationsforskningen. For det første bidrager afhandlingen med resultater fra nutidig og grundlæggende empirisk forskning til aktuelle diskussioner om demokratiske organisationsformer set i et bredere perspektiv. Resultaterne viser, hvordan medarbejdere kan komme til at opfatte selvstyrende og deltagelsesbaserede organiseringsformer som en mulighed for at gøre krav på mere deltagelse og beslutningskompetence. Dermed viser resultaterne, hvordan bestræbelser på at introducere og opretholde SMO'er har potentiale til at frembringe former for demokratisk deltagelse, der ikke oprindeligt var tilsigtet eller forventet af dem, der er ansvarlige for deres tilblivelse. For det andet bidrager den konstitutive tilgang, som jeg anvender i hele dette forskningsprojekt, med en ny forståelse af, hvordan indlejrede SMO'er kan overleve på trods af deres iboende paradoksale opbygning. Især viser min analyse fra dette perspektiv, hvordan alternative organisationsformer kan (re)produceres parallelt med eksisterende hierarkiske metoder. Dette anskueliggører mit projekt ved at vise, at de indbyggede paradokser og spændinger i indlejrede SMO'er i sig selv kan blive medskabende af alternative organisationsformer, idet disse spændinger forhandles igennem kontinuerlige meningsdannelsesprocesser hos aktører, der er involveret i at medskabe og opretholde de indlejrede SMO'er.

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PART I

Introduction: The allure of self-management

The underlying aim of my doctoral project is to attain and contribute to a better understanding of self-managing modes[1] of organizing (SMOs) embedded within the more hierarchical contexts of already existing organizations. This aim originated from my experience as a manager of organizational development in a large medical company that would later serve as the case firm of the first and second empirical studies in this project. There I observed with growing curiosity how a pilot experiment with SMOs came to elicit a great deal of fascination and hope over time among some of the firm's employees in what seemed to them the prospect of a welcome alternative to the hierarchical norm of organizing to which they had been accustomed. Not all employees shared this fascination, of course, nor was everyone pleased about the "buzz" surrounding an experiment many suspected to be just another management fad. Surprisingly, however, even after the initial buzz had died down and most of the organization had moved on, including the top managers who had launched the experiment in the first place, a small but significant minority of employees persisted in their commitment to what they felt were more autonomous and meaningful modes of organizing. Witnessing this fascination and wanting to understand how and why the SMOs held such allure for my colleagues and won their enduring commitment even when it was still quite unclear what these modes of organizing could actually "do" for them was what initially motivated me to embark on writing this PhD thesis – and it is part of the story that later became my second paper.

My former colleagues were far from unique in their fascination with SMOs either in business practice or in scholarship. Since the inception of management studies as a field, scholars have been discussing alternatives to the dominant managerial hierarchies of modern organizations and their concentration of authority and control in the hands of a select few. The desirability of organizing through "power with" rather than "power over" employees was influentially advocated by the "mother of modern management" herself, Mary Parker Follett (1868–1933), one of the pioneers of management and organization theory and a contemporary of Max Weber, the "father of bureaucracy". In one of her last lectures, given at the London School of Economics in 1933, Parker Follett

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[1] I mainly refer to "modes" and not "forms" of organizing to signal that my focus of research is on SMOs pursued within the more hierarchical structures of larger organizations and not on stand-alone "forms" of organizing as would be the case if an entire organization were pursuing ideals of self-management or democratic management.

famously stated as the basis for her advocacy of noncoercive power the principle that "genuine authority is the outcome of our common life" and "does not come from separating people, from dividing them into two classes, those who command and those who obey" (Parker Follett, 2013: 46).

The long history of interest in SMOs in organizational scholarship, (e.g. Barker, 1993; Burns and Stalker, 1961; Cohen and Ledford, 1994; Hackman, 1986; Rothschild-Whitt, 1979), encompasses various streams of research and numerous terms for describing slightly different manifestations of what I term "self-management", including "post-bureaucratic", "less-hierarchical", "collectivist", and "democratic" modes of organizing (see Lee and Edmondson, 2017). For the purposes of this dissertation, however, I opt to refer to all these variations as "self-managing" modes of organizing. First and foremost this is because "self-management" was the wording used in vivo by many of my informants across all three empirical studies, to a large extent reflecting the influence of Robertson's (2015) Holacracy approach that is often referred to as a "system of self-management" (Bernstein et al., 2016). A second reason for this choice is that Lee and Edmondson (2017) also employ "self-managing organizations" as an umbrella term for various streams of research in their comprehensive review of the literature. As such, "self-managing modes of organizing" (SMOs) enables me both to reflect the particularities of the empirical settings of my research while also capturing the wide spectrum of this phenomenon as it has been explored in academia.

Despite the long history of research on SMOs and of experimentation with such modes in practice, the question of how to realize the promised potential of self-management continues to pose a puzzle in theory and practice alike, above all because practitioners must inevitably navigate between the quest for decentralization intrinsic to all SMOs with the almost universally acknowledged need for some degree of centralized managerial function, especially in larger firms (Martela, 2023). Complex questions likewise persist regarding how to introduce SMOs *within* hierarchical organizational settings and how to maintain these modes alongside traditional modes over time. In such contexts, organizations or teams that adopt principles of self-management not only need to learn and implement SMOs in the first place but also struggle to maintain their modus operandi within an intra-organizational environment structured around very different organizational ideals. These questions are additionally challenging as *embedded SMOs* remain underexplored in the recent literature (Krüger, 2023). Although in contemporary practice SMOs are very often implemented within parts of already established

hierarchical organizations (Biancani et al., 2014; Diefenbach and Sillince, 2011; Martela, 2023), most recent studies have instead tended to explore efforts undertaken by *entire* organizations to operate in less-hierarchical ways (e.g. Jaumier, 2017; Lee and Edmondson, 2017; Martela, 2019).

In sum, together with the fascination that SMOs in general continue to hold both for researchers and practitioners, I take as the starting point of my dissertation the need for a more informed understanding of how SMOs are introduced and sustained when embedded within hierarchical organizational settings, investigating these questions empirically at different levels of organization: team-level, intra-organizational level, and inter-organizational level. I explore how the employees in my case setting actively engaged with embedded SMOs and thus give a voice to those who personally experimented with and even become advocates of self-management. The overarching research question I address in the three empirical papers of this cumulative dissertation is that of *How do embedded self-managing modes of organizing emerge and how are they perpetuated within established organizations?*

In the following sections of this introductory chapter, I first frame my three papers within the overall literature on SMOs before expounding the theoretical anchors of my empirical investigations. I then present the research settings of my case and detail my methodological approach. Finally, I provide an overview of each paper and their overarching contributions (see Table 1).

Literature review: Self-managing modes of organizing and the tensions of embeddedness

The long legacy of self-managing modes of organizing

All organizations must address a number of fundamental questions in order to work in a coordinated fashion towards their goals. According to Puranam et al. (2014), these questions relate to the following four aspects of any organization: (1) *Task division*, i.e. how the overall goals of an organization are broken down into smaller tasks and subtasks; (2) *Task allocation*, i.e. how these tasks are distributed among the individuals or groups who work to fulfill them; (3) *Reward distribution*, i.e. how those who do the work are rewarded for their efforts; and (4) *Information flows*, i.e. how the information needed to get work done successfully is provided or can be accessed. By this account, what distinguishes SMOs is how they go about addressing these fundamental questions in less hierarchical ways, essentially meaning the decisions they make depend to a lesser extent on centralized authority (Martela, 2019). SMOs thus typically comprise some form of participatory decision-making structures and processes of management that enable collective forms of control and distributed managerial authority, ideally supported by highly transparent communication and extensive access to information (Diefenbach, 2020).

Here it is important to emphasize that although the decentralized set-up of SMOs is often combined with the dissolution of certain layers of middle management (Martela, 2019), this does not imply a rejection of the need for management per se. Indeed it is widely acknowledged that organizations can hardly operate without top management overseeing strategic decision-making, especially in the case of large firms, though it is also generally agreed that middle management functions can be performed more cooperatively (Diefenbach, 2020; Martela, 2023), i.e. with middle managerial authority shared among members in accordance with agreed-upon principles of governance stipulating how decisions are to be taken and how tasks are to be allocated. In the case of self-managing teams, this means that team members assume shared responsibility for the managerial tasks that arise within their team (see Barker, 1993) and can decide autonomously together on how work gets done within their ranks even if the larger

organization in which they are embedded may rely on hierarchical principles of management (Krüger, 2023).

The promised benefits of SMOs are manifold, accounting in large part for what I term the "allure" of these modes of organizing. For some employees, SMOs appeal because of the promise they hold out of facilitating more empowering and meaningful work (Michaelson et al., 2014), affording greater autonomy in the way tasks are distributed and how decisions are taken on a daily basis (Soetens and Huybrechts, 2023; van Baarle et al., 2021) and thus potentially fostering a more meaningful and community-based work environment (Henderson, 2021). Some scholars have further argued that adopting more self-managing and democratic modes of organizing in the workplace could support the "fundamental values and principles of free and fully fledged democratic societies" (Diefenbach, 2020: 17; see also Honneth, 2023). According to Battilana et al. (2022), cultivating more democratic and participatory modes of organizing in the world of business could even play an important role in transitioning towards a more sustainable future, not least because corporations are responsible for causing and reproducing many of the social and environmental problems we face today.

As more or less radical or incremental alternatives to traditional managerial hierarchy, SMOs have been extensively explored in research and practice for many decades. In a comprehensive review of the scholarship on SMOs, Lee and Edmondson (2017: 13) have identified three distinct literatures or "categories of research" through which different manifestations of SMOs have been studied, labelling these as "organizational democracy", "humanistic management", and "post-bureaucratic organizing" – each with differing objectives and foci that have facilitated their particular development. In this typology, "organizational democracy" mainly refers to practices and scholarship focused on establishing more equal and cooperative relations between (front-line) workers and management through greater participation on the part of workers, often in the form of employee ownership and decentralized decision-making authority. The focus of "humanistic management", meanwhile, is on improving employee engagement and motivation by facilitating greater autonomy and participation – as well as a wider variety of tasks – for teams and individuals within organizations, with the ultimate objective being to improve performance through such empowerment. The more recent development of "post-bureaucratic organizing" as a form of SMO and category of research is aimed at fostering greater organizational flexibility, adaptability and innovation, with the premise being that horizontal decision-

making within networked structures can engender an organizational culture that nurtures learning and experimentation. All these various manifestations of SMO inevitably overlap to some extent and all continue to play a role in some shape or form in contemporary organizations.

The classic self-managing teams that emerged in the 1980s and 1990s were originally associated mainly with the humanistic management aims of strengthening team effectiveness through improved employee engagement and satisfaction, especially as these teams were often introduced in blue-collar contexts (Lee and Edmondson, 2017, see also Battilana et al., 2022). By contrast, the reasons given for introducing SMOs in contemporary organizations are often framed as a continuation of the post-bureaucratic ideal of fostering adaptability and flexibility in pursuit of innovation (Bernstein et al., 2016). Another difference with earlier scholarship is that the majority of more recent works on SMOs have explored how radical modes of decentralization can be maintained at the level of entire organizations (Lee and Edmondson 2017; Martela 2019). Again this contrasts with most earlier studies in the literature, which have historically been focused – in line with most practical examples of SMOs – on self-managing teams operating in more hierarchically organized environments. One major strand of this earlier research on SMOs investigated questions of individual and team-based behaviors and attitudes (e.g. Cordery et al., 1991; Ezzamel and Willmott, 1998; Langfred, 2005), while another strand investigated the performance or efficiency of such embedded less-hierarchical modes of organizing (e.g. Carson et al., 2007; Ciborra, 1996; Cohen and Ledford, 1994; Magpili and Pazos, 2018).

More closely aligned with the topic and focus of my own doctoral project, a major strand of study has investigated questions of control, power and authority in relation to SMOs. Here the focus of interest has been on the fundamental tensions that arise between the managerial and organizational need for centralized control to ensure coordination and stability, especially in larger organizations, versus the quest of embedded SMOs for more flexibility and adaptability, which necessarily entails granting employees greater autonomy (Langfred and Rockmann, 2016; Martela, 2023). Beyond the practical aspects of these tensions, scholars in this stream have pointed out the pervasiveness and persistence of power, status and hierarchy as self-reinforcing and perpetuating features of organizations that often remain fundamentally unchanged in organizational processes even as the world of work and the environment evolves and changes (Magee and Galinsky, 2008; Pfeffer, 2013). Together such insights underscore the inextricable link and

inherent tension between power and empowerment, thereby explaining the failure of many empowerment programs (Hardy and Leiba-O'Sullivan, 1998). In the context of self-managing teams, this link is evident in cases where managerial control is replaced by peer-based sources of authority in the form of normative rules that exert even more control over employees than traditional managerial hierarchy (Barker, 1993). Indeed, research has revealed that informal forms of power and hierarchy tend to develop even in the absence of any formal structures or normative rules, persisting despite seemingly democratizing changes in communication and information structures such as the advent of social media (Turco, 2016).

Problematizing these claims as to the apparent inevitability of hierarchical tendencies (re-)emerging even in organizational contexts based on principles of democratic co-operation and community, more recent research in this field has investigated how the supposed "iron law of oligarchy" can be resisted through different efforts and negotiations to ensure democratic organisations remain "oligarchy-free" (Diefenbach, 2019; Jaumier, 2017). Findings from such research appear to indicate that although the strong rules and ideals of alternative and self-managing organizations can certainly add a degree of normative and/or peer-based control, these rules can also be liberating and help to sustain SMOs over time (Dahlman et al., 2022; Islam and Sferrazzo, 2021; Shanahan, 2023; Soetens and Huybrechts, 2023). While these studies have certainly yielded valuable insights, their focus has been on SMOs and other alternative modes of organizing adopted across entire organizations rather than within wider organizations. As can readily be imagined, however, the problem of creeping hierarchical control may well be even more pronounced in cases of "internal hybrids" where a plurality of modes of organizing coexist within the same organization (Kolbjørnsrud, 2018). By way of introducing the issues closer and most relevant to my own empirical investigation, therefore, in the following section I delve more deeply into the tensions that can arise in the hybrid setting of embedded SMOs. Here it should be noted that, although there are various kinds of hybrid organizations, in the context of my doctoral project I use this term to refer to a combination of bureaucratic and self-managing modes of organizing and thus plural systems of control (Kolbjørnsrud, 2018).

The tensions of embedded self-managing modes of organizing

The very notion of organizing self-management within a hierarchical setting may reasonably seem not only problematic but outright self-contradictory. After all, how can a mode of organizing intended as an alternative to hierarchical control be expected to exist within and alongside a hierarchical setting? It comes as no surprise, then, that the literature should be replete with accounts of the "tensions" (Islam and Sferrazzo, 2021; Langfred and Rockmann, 2016) and even "paradoxes" (Barker, 1993; Stohl and Cheney, 2001) that tend to arise in SMOs – as indeed we have seen to be true of the literature on various forms of self-management and organizational democracy in general (see Lee and Edmondson, 2017). Here "tensions" is used as the broadest term for denoting varying degrees of discomfort with the choices available to actors in such hybrid contexts, often because these choices, though not necessarily mutually exclusive, involve some degree of trade-off (Putnam et al., 2016). In the literature, moreover, "tensions" is often used as an umbrella term or loose synonym for adjacent concepts such as dualism/duality, contradictions, dialectics, and paradoxes (see Putnam et al., 2016). By contrast, the term "paradox" is used more precisely to refer to organizational dynamics that produce seemingly irrational or even absurd outcomes (Smith and Lewis, 2011).

Referring to the specific context of embedded SMOs, Stohl and Cheney (2001: 360) have identified four overall types of what they call "paradoxes of employee participation and workplace democracy" arising from self-contradictory demands on employees in relation to structure, agency, identity, and power. First, vis-à-vis the architecture or structure of participation in embedded SMOs, they sum up the apparent absurdity of ensuing demands on employees as a paradoxical exhortation to "Be spontaneous, creative, vocal, and assertive in the way we have planned!" Second, regarding individual employees' sense of agency, they caricature the paradoxical setup of embedded SMOs as a call to "Do things our way but in a way that is still distinctively your own!". Third, they summarize the tensions relating to issues of identity and commitment in the context of embedded SMOs as ensuing from a self-contradictory call for employees to "Be *self*-managing to meet *organizational* goals!". Fourth and finally, Stohl and Cheney emphasize the intrinsic paradox of embedded SMOs in relation to the exercise of power and control as a demand imposed on employees to "Be independent, just as I have commanded you!" Absurd as these summations may seem, they are not so far-fetched insofar as embedded SMOs may be envisioned as "islands" of autonomy in a "sea" of hierarchical expectations wherein employees must navigate their own pursuit of participation and

autonomy whilst simultaneously adhering to the rules of the surrounding organization (see Krüger, 2023). All these tensions and paradoxes not only pose challenges for employees in embedded SMOs but also for managers in organizations that feature such parallel modes of organizing (e.g. Druskat and Wheeler, 2003; Langfred and Rockmann, 2016).

In abstract terms, then, it is convenient if simplistic to describe these tensions experienced by individual employees and managers as manifestations of the inherent contradiction involved in pursuing less hierarchical modes of organizing within otherwise hierarchically organized contexts. Beyond the level of individual experiences, the organization-theoretical question certainly does arise of how SMOs aiming at greater autonomy and employee participation in decision-making can be sustained in the face of the managerial and organizational need for – and conventional expectations of – top-down control and authority (Hardy and Leiba-O'Sullivan, 1998; Langfred and Rockmann, 2016; van Baarle et al., 2021). Whereas such an account of the tensions arising from embedded SMOs assumes a clear-cut distinction between self-managing and hierarchical modes of organizing, however, I align with scholars that regard most instantiations of organizing as falling somewhere along a spectrum between two (ideal) poles of "entirely self-managing" and "fully hierarchical" modes of organizing (Martela, 2019).

As a useful way of conceiving this spectrum, we can again draw on Lee and Edmondson's (2017: 39) review of the literature on SMOs and their suggestion that what distinguishes self-managing from hierarchical modes of organizing are differences of degree in the fundamental "reporting relationship between manager and subordinate" and thus the extent to which authority is decentralized regarding the monitoring of work and the allocation of tasks and resources, with the most radical form of self-management further encompassing organizational design, performance management and even firm strategy (see also Martela, 2019). At one end of this spectrum, extreme managerial hierarchy would entail the centralization of all these aspects except in part how work is executed, hence SMOs can be thought of as more or less radical according to the extent they involve the full or partial decentralization of most or all of these aspects, with most examples in practice – and by definition in the case of embedded SMOS – retaining some degree of centralized authority when it comes to performance management and firm strategy (Lee and Edmondson, 2017). By this account the poles of the self-management/hierarchical management spectrum are neither entirely separate nor

necessarily mutually exclusive but rather constitute a duality wherein "the organization" can encompass aspects of both managerial hierarchy and self-management. In the case of embedded SMOs, self-managing teams must thus navigate the interdependence of both poles, being part of a wider hierarchical structure while striving for decentralization (Farjoun, 2010; Putnam et al., 2016).

Notwithstanding the value of such an organizational design-oriented perspective in affording a clearer understanding of what embeddedness means in the context of SMOs, including how embedded SMOs would operate in ideal form, applying this perspective alone cannot help alleviate the persistent problems and tensions and even paradoxes that actors need to navigate in practice. While acknowledging and incorporating this perspective on the tensions I investigate in my doctoral project, therefore, I approach these from a perspective that also includes a recognition of the crucial role played by the hope and commitment many employees invest in embedded SMOs and the persistence with which they address the tensions they inevitably encounter. In particular, my three empirical studies focus on how the actors in my case negotiated the interrelated tensions arising from the following three challenges typically arising in the context of embedded SMOs: (1) Sustaining embedded SMOs: How to sustain "islands of self-management" in a sea of hierarchical expectations and how to balance the desire to be different with the need to fit in; (2) Introducing SMOs within established organizations: The incongruity of either mandating grassroots participation from the top or developing it out of a grassroots movement that might never gain legitimacy; (3) The sometimes isolated balancing act of employee activists: How to deal with the ongoing tensions of wanting to push for an alternative while being part of the system without giving up. To gain insights into how actors negotiate these tensions to sustain their preferred mode of organizing over time, I adopt a constitutive understanding of organizing and organizations as the theoretical basis for my three empirical investigations. As I elaborate below, this perspective is particularly well-suited for attaining a better understanding of the continuous processes of meaning-negotiation needed to sustain the precarious and tension-laden phenomena of embedded SMOs.

Theoretical considerations – a constitutive view on embedded SMOs

Developing and sustaining embedded SMOs (or any alternative mode of organizing) over time is an effortful and never "completed" accomplishment entailing continuous negotiation, persistence and enduring commitment on the part of employees (Dahlman et al., 2022; Islam and Sferrazzo, 2021). In exploring this phenomenon to address my overarching research question (*How do embedded self-managing modes of organizing emerge and how are they perpetuated within established organizations?*), each of my three papers within this PhD project illuminates different aspects and challenges of initiating and sustaining embedded SMOs. Paper 1 emphasizes the role of (communicative) boundary work in sustaining embedded SMOs alongside more hierarchical modes of organizing, while Paper 2 further develops the concept of momentum, focusing especially on the transition from top-down momentum in the introduction of SMOs to momentum driven from the bottom up. Paper 3 explores how participation in an inter-organizational community of employees striving for alternative modes of organizing can develop and strengthen employee activists' perceptions and experience of their change agency.

While each paper is centered on different concepts, all three share a number of underlying premises and theoretical anchors. In particular, my overall approach in this project is grounded in a constitutive view of organizing and organizational analysis that focuses on how social life is formed through a communicative process of continuous negotiation of symbolic and material meaning (Ashcraft et al., 2009), with language and interactions understood not merely as reflecting but creating reality (Putnam et al., 2016). A (communicative) constitutive view is particularly useful as a theoretical lens for examining more ephemeral and contested modes of organizing (Schoeneborn et al., 2022) since such an understanding conceptualizes any organizational reality as at least to some extent "up for grabs" (Ashcraft et al., 2009: 4). This approach is thus especially apt for investigating the phenomenon of embedded SMOs, which as I have emphasized in the literature review section do not simply "exist" but need to be constantly reified through continuous communicative efforts (Krüger, 2023, see also Shanahan, 2023). Such continuous efforts are needed not only because embedded SMOs must resist more dominant hierarchical modes of organizing but also because they are often initially constituted through changed interaction patterns and do not always make it – at least not immediately – into the more codified features of the larger organization such as organizational charts, official job descriptions, or contractual obligations.

Similar to alternative forms of organizing more generally, embedded SMOs depend on symbolic sets of principles and (communicative) processes that must be continuously enacted lest they cease to exist (Dahlman et al., 2022; Shanahan, 2023, see also Krüger, 2023). From this perspective, embedded SMOs comprise a set of interactions such as specific meeting and decision-making routines, a particular vocabulary, etc., that manifest as new meanings within the organization and are enacted and reproduced in communication as actors engage with them – as for example when a team follows a specific decision-making process in a meeting. Since embedded SMOs coexist with and must compete with other potentially more powerful meanings, i.e. with the predominant norm of a hierarchical mode of organizing, they are particularly fluid and precarious communicative accomplishments (see Dobusch and Schoeneborn, 2015). As such, actors must invest significant efforts into the reproduction of the particular communicative practices through which SMOs are constituted and must consider such self-management meaningful enough to co-orient their actions towards it.

By this account, an organization may be understood as composed of many different intra-organizational communities, with each community being at least to some extent distinct in the textual and interactional patterns that co-orient the actions of its individual members (see also Taylor, 1993). As a potentially observable manifestation of this distinctiveness, for example, texts or interactions that one community considers rational may not resonate well with another insofar as these interactions are situated in modes of making sense peculiar to a particular community and/or in the way it makes sense of specific conversations. In this understanding of organization, embedded SMOs thus comprise a distinct system of interaction-patterns that co-orient multiple individuals' actions and sense-making and thereby coalesce these individuals into communities of activities of that particular mode of organizing (Taylor 2009). Accordingly, as Putnam et al. (2009: 4) note, "an analysis of constitution tends to 'unmask' a phenomenon, thus revealing the contingency of and work required to sustain an organization or to reveal the multiple forms of organizing", again making a constitutive approach highly suited for investigating how embedded SMOs are sustained.

As a final point to note in favor of adopting a constitutive view to investigate my research questions, it should be clear from the preceding outline that a constitutive understanding fits well with observations from prior scholarship and with the starting point of my investigation that embedded SMOs are intrinsically prone to generate

multiple tensions, contradictions, and even paradoxes that actors must continuously navigate (e.g. Islam and Sferrazzo, 2021; Langfred and Rockmann, 2016; Stohl and Cheney, 2001). Indeed, a constitutive view on organizing precisely "focuses on how organizational members enact tensions and respond to contradictions in and through written and visual texts; co-developed meanings and interpretations for actions; and performances of rituals, narratives, and normative practices" (Putnam et al., 2016: 78). Far from being seen as passive in the face of these tensions, organizational members in this view are understood to have "significant agency, not merely in reacting to external dynamics but in creating, shaping, and responding to such dynamics" (Vedel and Geraldi, 2022: 2). Not only do organizational members react to and try to work through such tensions, contradictions and paradoxes, moreover, they also "respond to and process contradictions in ways that create systematic patterns [that] become embedded in routines and structures, are brought from the past into the future, and evolve as organizing continues across time and space" (Putnam et al., 2016: 77).

In sum, interpreting my empirical cases through a constitutive lens provides me with a theoretical framework that helps me to understand and explain not only the continuous enactment needed to perpetuate these modes of organizing but also to capture the ways in which employees negotiate the tensions and paradoxes they encounter in this context. Such an understanding is crucial to address the question of how embedded SMOs emerge and are perpetuated in spite of their inherently ephemeral and contested characteristics. These theoretical assumptions are more explicit in my first and second papers but less explicit in the third, since this last paper zooms in on the lived experience of employee activists and thus its analysis is only partly concerned with how this experience is communicatively constituted.

The Cases: MedCo and The Community

The three papers in this project are based on three distinct data collections conducted in two different empirical contexts: the intra-organizational context of "MedCo" and the inter-organizational context of "The Community" (names pseudonymized). Below I present an overview of these case settings, further explaining how I accessed these settings and my role in these fields.

Accessing the field

The first and second papers of my doctoral project focus on the SMOs piloted and partly implemented at MedCo, a large German manufacturer of medical technology and pharmaceuticals. I was employed at MedCo from 2016 to 2019 in one of the departments that piloted the new modes of organizing. During this pilot project I was not only a change recipient but also became actively engaged in "TeamLoop", the self-management system developed by the company. Over time, my own fascination with the dynamics that unfolded during the pilot project and my desire to delve deeper into theoretical explanations of what I was witnessing prompted me to write a PhD proposal centered on embedded SMOs. As I became more certain that I would be leaving the company to pursue a PhD, I began discussing with my superiors the possibility of collecting data at MedCo. I am extremely grateful that the head of my department at the time was very supportive of my undertaking. The company even proposed an option whereby I could remain employed by the company while doing my PhD, i.e. in a model similar to the industrial PhD program in Denmark. However, I determined it would be better to focus solely on research, above all because I felt it was of paramount importance to have complete academic autonomy over my project. I thus took up my new position at Copenhagen Business School with no formal ties to MedCo. The company proved extremely generous in letting me "back in" as a researcher, not only allowing me to take documents related to TeamLoop with me when I left but also assuring me that I would be welcome back once I was ready to start my formal data collection.

I began formally collecting data six months after I had left MedCo. As I explain in the section below on my research approach and empirical process, my data collection proceeded through several phases. Later on in this process I arranged a non-disclosure agreement with the firm whereby I retained full control of the data collected on condition that I kept my informants anonymous and omitted any mention of information that

could potentially be strategically relevant. Although I did share my research findings with the company as one way of testing my analyses (see Lincoln and Guba, 1985), MedCo reserved no right to review or approve my research.

It was while I was collecting data for the first two papers of this project that I was made aware of the significance of an (external) inter-organizational community that would later become the case setting of my third paper. More specifically, I first learnt about "The Community" when it was brought up independently by two of my interviewees from MedCo, both of whom separately told me how important this support system was for them and how the opportunity it afforded to exchange views with other like-minded people had helped them greatly in their efforts to sustain and develop the embedded SMO at MedCo. Having decided to study The Community for the third paper, I reached out to the then representative of The Community to discuss my proposal. He was open to the idea but told me that he first had to check back with other members. After some deliberation, they generously let me join their ranks, meaning I was able to be part of their events, to access their online platform, and allowed to contact Community members for interviews. Similar to my arrangement with MedCo, I retained full freedom over my research, though in this case without a non-disclosure agreement. As with MedCo, I later shared my insights with members of The Community to test my emerging ideas and interpretations.

MedCo – between tradition and an atmosphere of departure

Established over 180 years ago, MedCo is a German manufacturer of medical technology and pharmaceuticals that has grown significantly in the past 50 years from a medium-sized company with a workforce of 3,100 in 1976 to a global corporation with approximately 65,000 employees in more than 60 countries at the time of its 2019 Annual Report. With this expansion the firm became increasingly interested in finding appropriate ways to facilitate greater collaboration. In 1998, for example, the firm issued a report entitled "Future ways to work" aimed at identifying solutions to improve the "structuring of the information, communication, and decision-making procedures within the company" as well as an "appropriate spatial design for the modern world of work" (p. 14). The solutions proposed in this report centered on embracing advances in emerging new information technology and on the introduction of what it termed "Office Concept 2010" as a way of promoting open spaces and non-territorial offices at the company's headquarters. Based on the premise that "hierarchies have become less

significant" (p. 29), the new office layout was intended to enhance communication and nurture individual responsibility and initiative. However, it took nearly two decades for this vision of less-hierarchical collaboration to be applied to MedCo's actual mode of organizing. In 2018, the firm's then-CEO reflected as follows during the lead-up to the launch of a pilot project to test new modes of organizing:

> Companies still organize their work in hierarchies and organizational charts. Together with our employees, we asked ourselves: Why have organizations remained unchanged for decades? What are the consequences of this traditional approach in an increasingly complex world of work, and does it still do it justice? (p. 10)

Further influenced by a broader societal discourse on the future of work at this time, as exemplified by the German Federal Ministry for Labor and Social Affairs' initiative for companies to explore new modes of organizing, (Bundesministerium für Arbeit und Soziales, 2020), MedCo's deliberations culminated in the initiation of a pilot project focused on self-managing modes of organizing. This project was implemented in two pilot departments: Corporate HR and Corporate Communications. While the CEO supported this project, responsibility for its governance rested with these two pilot departments, at that time operating under a single department head (Internal magazine 2018: 13). Since SMOs were a novelty for MedCo, the main aim of the initiative was experimental, with no requirement that these changes be adopted beyond the pilot project.

TeamLoop – self-managing modes of organizing at MedCo

Following a period of planning in late 2016, the two departments embarked on their journey of experimentation by hosting a joint kick-off workshop in February 2017. This was followed by a series of brief monthly workshops within the respective departments. During these workshops, the staff of the departments progressively developed and evaluated a new decentralized mode of organizing, pseudonymized here as "TeamLoop". In contrast to the previous line-hierarchy, the new modes of organizing were based on cross-functional collaboration, decentralized communication and decision-making processes, and an increased level of transparency both within and outside of the two departments.

Inspired by the principles of Holacracy, a decentralized self-management system developed by Brian Robertson (2015; see also Bernstein et al., 2016), whose philosophy

was reflected in a modified form in TeamLoop, work in the new system was no longer to be executed in accordance with static job-functions and set teams but according to a role-based governance structure, with employees structuring their work in adaptable roles clustered within equally flexible "circles". In this new system a single individual could assume multiple roles across various circles, with each role accompanied with corresponding decision-making authority (van de Kamp, 2014). This decentralized mode of organizing was supported by specific meeting routines to facilitate communication and the continuous adaptation of roles and circles. Unlike managerial hierarchy in which only the execution remains partly decentralized (Lee and Edmondson, 2017; Martela, 2019), the TeamLoop approach in its ideal fully-fledged form would entail full decentralization of the way work was executed and designed, with partial decentralization of the allocation and monitoring of work as well as of performance management, leaving only the company's strategy fully centralized (see Figure 1). In practice, however, TeamLoop was only adopted in its most radical form in a limited number of contexts in MedCo (with one example being the team investigated in the first paper of this dissertation). Other teams and departments implemented TeamLoop to the degree they felt practical for their contexts and thus operated somewhere between TeamLoop in its ideal form and previous ways of working.

Figure 1: Decentralized authority at MedCo[2]
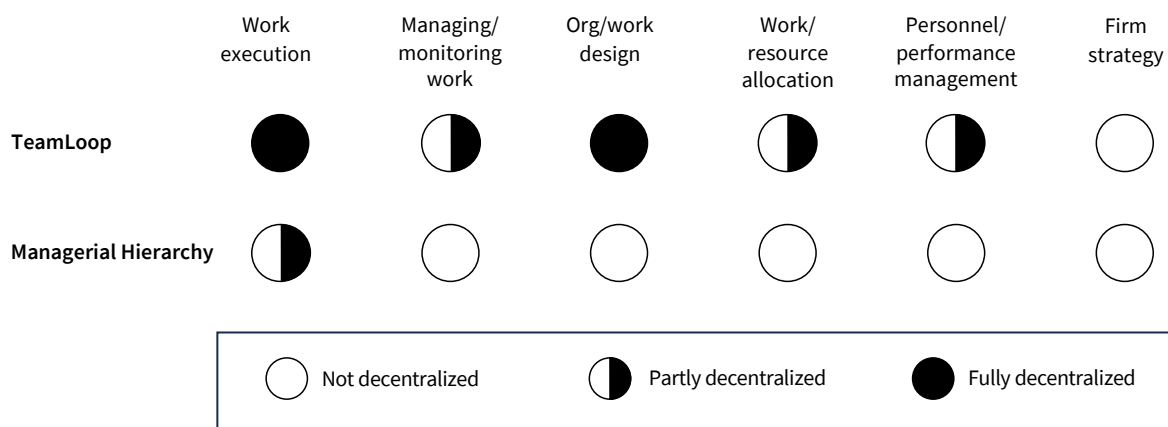
Since the organization as a whole still operated along traditional lines, the new governance structures needed to operate "in parallel" with the prevalent hierarchical

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[2] Adapted from Figure 1 in Lee and Edmondson (2017: 47)

structure in order for the adopting teams and departments to remain compatible with the rest of the organization. During the early phase of the TeamLoop pilot experiment, the experiences and learnings of the pilot departments were documented for the purpose of later sharing these with others across the organization. In addition, a number of "change guides" were elected by their colleagues to receive extra training in order to support the pilot departments once the engagement of external coaches who facilitated the initial workshops had been phased out in autumn 2017. While the pilot departments continued further developing their internal practices with varying degrees of adoption and success in different teams, the head of the pilot departments – and occasionally also the CEO – undertook various dissemination activities to share experiences of the TeamLoop process.

As interest grew among other parts of the organization in learning more about the SMO practices, the change guides became inundated with requests. To cater for this increasing demand for "new work practices", an in-house "change unit" was founded in summer 2018. From that time onwards, self-management practices at MedCo were further developed and spread to other departments in a process of non-concerted diffusion. Although many departments decided that TeamLoop was not really what they needed after holding one-off introductory workshops, several departments and teams decided to adopt and stick with the system. TeamLoop thus continues to endure at MedCo to this day, albeit the initial name is no longer in frequent use. Indeed, after a couple of years in which the embedded SMOs were mainly sustained bottom-up by a few persistent and resolved groups of people, I hear that the ideas and principles of TeamLoop have recently gained more widespread application within the company.

The Community – inter-organizational solidarity for new modes of organizing

The third paper of my dissertation focuses on an empirical case set within a German inter-organizational community of employees dedicated to championing and advancing more "self-determined and meaningful" workplaces. This mission, as articulated on the Community's official website, extends to reshaping broader societal approaches to work. The Community was established in 2017 by a group of 12 employees from a range of prominent German companies with the primary objective of facilitating discussions and exchanges about more self-directed and purposeful forms of organizational structures. Prior to founding The Community, the 12 initial members had convened at various gatherings set up to explore self-determined organizational models. However, they

observed that most of the discussions at these gatherings primarily revolved around startups and smaller businesses, whereas they shared the common perception that advocating for and implementing novel organizational approaches posed unique and more significant challenges within existing corporate environments.

Since its inception, The Community has met up regularly (bi-annually during the time of my study) to discuss topics important to its members. These meetups are always held at one of the member companies. In addition, there are several regional or topic-specific sub-groups that meet on- or off-line and according to the rhythm they set for themselves. When I became part of this community as a researcher, its membership had grown to encompass approximately 200 individuals spanning more than 90 different companies. The Community boasts a diverse array of roles among its members, including generalist in-house consultants, IT professionals, union representatives, and change facilitators steering companies towards more sustainable practices. Membership is open to individuals and not tied to their respective organizations, thereby allowing members to retain their affiliation even if they change jobs. Also important to note is that the Community operates on a non-profit basis, with all activities and functions being solely reliant on the voluntary contributions of its members. To maintain the community's integrity and prevent it from evolving into a marketplace for consultancy services, membership typically requires affiliation or at least substantial experience with larger established companies rather than experience only in external consultancy roles.

My role in the field

As mentioned earlier, I was employed at MedCo from 2016 until July 2019 and was directly engaged with TeamLoop in one of the two pilot departments before I left the company to start my PhD in September 2019. As such, my later role during data collection could best be described as one of an insider researcher without formal ties to the case firm (see Brannick and Coghlan, 2007). My previous experience in the company was extremely valuable for my research because the trust and familiarity I had already built up in the field made the data and the context of MedCo more accessible to me (Flick, 2014). Having worked there for three years, I had a level of preunderstanding (Brannick and Coghlan, 2007) that meant I was able to understand the organization's discourse and jargon, its micropolitics, and the possible meaning of certain events. Trustworthy relationships developed (or resumed) swiftly because I was able to speak my informants' language and had been in a similar job to them. While this is not so surprising in the case

of those employees who already knew me as their colleague, the further the data collection progressed the more I also engaged with people who did not know me, especially when collecting data in the community where I initially only knew the two members who worked for MedCo. In this context as throughout my data collection, my overall experience was that the people I met often treated me as one of their own and kindly placed a lot of trust in me, for which I am immensely grateful.

Altogether these factors would suggest I had the "perfect deal" insofar as I was able to reap the benefits of insider research without having to navigate the dilemmas associated with full insider research of combining dual formal affiliations with academia and with the organization (see Brannick and Coghlan, 2007). All the same, I sometimes struggled with this particular setup and the different identities I needed to navigate as I moved in and out of my roles as insider and outsider (Gosovic, 2018), including difficulties on account of the discrepancy between the empathy I felt for those I met during my fieldwork and the critical distance required of me in my role as a researcher. Indeed, in the period when I first started working on my PhD but had not yet begun my formal data collection I was so worried about being too close to my field-to-be that I made conscious efforts to distance myself from my former workplace. Over time, however, I found more productive ways to address this insider-outsider tension and (re-)entered the field in my new role as a researcher six months after starting the PhD in a spirit of curiosity and discovery. This willingness to let myself be surprised and eagerness to re-discover and re-apprehend once-familiar phenomena was partly why I used very open-ended interview-guides in the beginning and remained very open during the first rounds of data analysis. Wherever possible I always tried to triangulate my interview findings with other sources such as reports and presentations. I also discussed my interpretations with peers and – at a later stage – with some of my interviewees (Brannick and Coghlan, 2007).

I nonetheless sometimes found myself in situations where my informants would ask my opinion about certain problems and situations during our interviews. This inevitably involved a balancing act since I did not want to give my opinion or advice on practical problems while the data collection was still ongoing but also did not want to seem closed-off or indifferent. In these cases I thus tried to stall and postpone such questions until the data collection was concluded when I could then talk to some of my informants again to discuss my initial findings and hear their views, which also served as a valuable form of member checking (Lincoln and Guba, 1985). These post-interview

conversations also provided welcome opportunities for me leave my role as a researcher and take on a more involved stance after I had listened to my informants' feedback and reflections on my findings.

Research approach and empirical process

Three empirical studies form the main corpus of this dissertation. As is the case with cumulative dissertations in general, the ultimate ambition is for these to be developed in such a way as to be publishable in peer-reviewed journals, hence the three papers not only adhere to the common norms of journals in terms of length and conciseness but have also undergone various iterations, incorporating feedback from peers and conference presentations and in some cases from revise-and-resubmit processes. As a result, some of the contextual information, including many of the detours taken and the choices I made along the way, has been lost in the form I now present the papers. To provide insight into this additional context, therefore, the following sections describe and reflect on my research approach and empirical process, including the key choices I made throughout this process.

Research approach and assumptions

As elaborated in the Theoretical Considerations section above, I adopt a (communicative) constitutive approach to address my overarching research question of how SMOs emerge and are perpetuated within established organizations, thus investigating my empirical settings from a perspective that recognizes and focuses on the need for continuous negotiation of meaning among actors to sustain embedded SMOs (Putnam et al., 2016; Putnam and Nicotera, 2009). In line with this bottom-up processual view of organization as a phenomenon developed through communicative processes and events (Putnam et al., 2016; Taylor, 2009), I apply a qualitative interpretivist approach to understand "the meanings that actors attach to actions, interactions, experiences and phenomena" (Blagoev and Costas, 2022: 81). My project is thus based on interpretivist epistemological assumptions with a focus on "how people understand the changes they are both instigating and dealing with, and how those meanings evolve" (Langley and Abdallah, 2011: 213). Following this epistemological stance, I understand organizations as constituted and evolving in processes of social construction (Gioia et al., 2013). This approach is especially appropriate for capturing not only how embedded SMOs are co-constructed over time but also how those who work in such settings experience and make sense of these settings and their attendant tensions.

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As summarized in the preceding literature review, SMOs have been explored from manifold perspectives over the years, with studies repeatedly revealing and confirming the tensions that such modes of organizing can entail, especially when practiced and embedded within the larger context of managerial hierarchies. While SMOs are thus a well-known phenomenon, questions still remain with regard to how such modes of organizing can be maintained when embedded within settings that follow other organizational norms. To generate new insights into the phenomena studied in this thesis, therefore, I adopt a constructivist approach that seeks "to reconstruct, and in some cases, deconstruct, taken-for-granted interpretations of empirical phenomena" (Blagoev and Costas, 2022: 89–90). This approach is particularly appropriate in the context of embedded SMOs, not least because studies in the earlier literature on self-managing teams were based on the assumptions and aims of humanistic management primarily "focused on improving the individual experience at work by altering relationships between managers and subordinates to be more satisfying and motivating" (Battilana et al., 2022: 10), whereas the phenomena I encountered in my empirical settings went far beyond such a contained conceptualization, suggesting a need for new interpretations.

Approaching my data based on the tenets of constructivist reasoning, I started my analysis inductively (Charmaz, 2006), especially during the first iterations, later moving towards more iterative reasoning and somewhat abductive reasoning by shuttling back and forth between emerging empirical insights and theoretical ideas (Gioia et al., 2013; Locke et al., 2008). This was especially the case in the first two papers where I settled on a theoretical framing rather early during my data analysis. By contrast, the approach to the third paper remained more inductive throughout the analysis as there was very little literature on the type of community dynamics uncovered in the study, leading my co-author and I to develop our own notion of "dispersed collectivity".

Consistent with the constitutive perspective I apply to my data overall, I place particular emphasis on the meanings that the actors in my cases attached to and employed to negotiate their mode of organizing. As pointed out in the theory section above, this constitutive view is more explicit in the first and second papers. In addition, my analyses were shaped by a processual view (Hernes and Weik, 2007) on organizing that focuses on "the *processes* by which organizing and organization unfold" (Gioia et al., 2013: 16, emphasis in the original; see also Langley, 1999). This view further enabled me to highlight the continuous efforts at meaning-making whereby actors negotiated their modes of organizing. Such a processual understanding and analysis clearly fit well with

a constitutive approach that similarly takes a processual stance on communication as constitutive of organizations (Putnam and Nicotera, 2009).

The process of data collection

I embarked on this doctoral project with a general interest in the fascination I had witnessed among colleagues with SMOs whilst I was employed at MedCo. From early on in this project I decided to pursue this interest and investigation in different empirical settings, hence the three separate empirical studies in this project draw on three distinct data collections. Thus, Paper 1 presents an in-depth qualitative case study of an embedded self-managing team over a 10-month period as the members of this team struggled to maintain their SMO, while Paper 2 relies on document data and retrospective interviews with MedCo employees about the development and the diffusion of the SMOs within the company. Paper 3, which follows the case of an inter-organizational community of employees advocating for more self-managing modes of organizing within their respective companies, is grounded in a combination of in-depth interviews with community members and participant observational data gathered both from offline community events and an online platform from March 2021 to January 2023. As evident in the following account of my data collection process, the data for the three papers were not collected in the same order as the papers are presented here. In addition, the course and manner of my data collection were strongly affected by the circumstances surrounding the Covid-19 pandemic, which in several instances led me to change my plans.

Data collection in February 2020

I started my PhD studies in September 2019 after leaving MedCo in July earlier that year. As is often the case with doctoral projects, I spent the first months as a PhD student endeavoring to become more familiar with the field of my studies and refining some of the initial theoretical ideas that had informed my initial proposal for the research project. In my case this phase went hand-in-hand with developing preliminary ideas about my empirical approach. As mentioned earlier, on leaving my job to assume my new role as a researcher my former employer had kindly granted me permission to take away documents related to MedCo's pilot experiments with SMOs (i.e. TeamLoop). In addition, I was able to draw on notes I had taken while participating in several workshops on TeamLoop as an employee. These documents and notes proved valuable

as I prepared to undertake my first data collection for what later became the second paper of this thesis. It was during this phase that I first considered the concept of "momentum" as a way of understanding how interest in TeamLoop had meandered through the organization over time and seemingly developed a life of its own. Bearing these preliminary ideas from this first phase in mind, I finally entered the field as a researcher in February 2020, spending two days in the firm's headquarters conducting eight interviews aimed at tracing how the idea of TeamLoop had traveled and developed within MedCo. I further used this visit to bring myself up to date with developments related to TeamLoop and to prepare for further data collection, including identifying additional interview partners for a next wave of interviews I planned to conduct a couple of months later. At this point I was also involved in talks aimed at finding a team or department I could join for an extended period of time to observe how they implemented and experimented with TeamLoop. Due to the outbreak of the Covid-19 pandemic, however, I was forced to revise and adapt my research plan since it no longer seemed feasible to join a team for an extended period during my PhD fellowship.

Continued interview collection: August/September 2020

After a period of several months waiting to see how the pandemic would develop, it became clear that no return to normal was to be expected for a long time to come. Since MedCo was part of the healthcare sector, moreover, the firm maintained strict social-distancing rules that made it impossible for me to return on-site even as certain restrictions were temporarily loosened in wider society. I thus continued my interview collection remotely, conducting 12 additional interviews online with people who had adopted TeamLoop (and in some cases had since abandoned the idea). In this round of interviews I spoke mainly with individuals outside of the two pilot departments or with those who had joined the departments after the pilot project. As it became clearer that I would not be able to return for extended field-work due to the pandemic, I started to look for alternatives to on-site field work that would still enable me to follow a group of people who worked with SMOs at MedCo for a longer period of time.

Remote shadowing of a team: October 2020–July 2021

Later in 2020, I incidentally heard from a former colleague that the team I used to belong to at MedCo were facing considerable pressure from the newly installed head of department to justify their self-managing mode of organizing and had recently been

given an ultimatum to present their rationale for continuing to pursue the SMOs. Since it had always been my plan to study more closely how a team struggles to sustain an embedded SMO, I took this new development as a starting point to follow the team over a period of some 10 months as they tried to negotiate their mode of organizing. This data collection would become the basis for the first paper, including data from sequential interviews with two team members, one-off interviews with other team members, and important stakeholder and documents about the development of the team's self-management practices. Given that on-site observations were not possible due to the pandemic, opting for a sequential interview approach by repeatedly interviewing two team members over the course of ten months enabled me to follow developments in the team more closely than would have been the case if I had solely relied on one-off interviews (Crawford et al., 2021; Hermanowicz, 2013). Similar to punctuated observations, this interview approach (Lamont and Swidler, 2014) afforded me a better understanding of how the actors navigated changes over time. A key advantage I enjoyed in this context was that I was already familiar with the team's practices and most of its members. Since I was unable to be on-site in this period, it would otherwise have been difficult to establish this level of understanding remotely with an unfamiliar team.

The Community: March 2021–January 2023

The idea for my third paper was prompted by two members of the team I was following at MedCo who belonged to an inter-organizational grassroots community operating in German-speaking countries and advocating for a more autonomous world of work. On joining this community in 2021, I subsequently attended four of their bi-annual events, became part of their online platform, and conducted interviews with 15 of their members. These data later became the basis for my third paper investigating how such inter-organizational communities matter for advocates of alternative forms of organizing and how they help such employee activists stay committed to their cause.

Reflections and limitations

In total I conducted close to 60 interviews, spent several days doing participant observation, and collected numerous documents and online posts across the three studies. As mentioned, I had initially planned to do much more observation and join a team for several months but this plan was thwarted due to the Covid-19 pandemic. Indeed the repeated lockdowns and uncertainties surrounding the pandemic posed significant challenges to my data collection, especially as I was based in Denmark while collecting my data in Germany at a time when travel was extremely difficult. Even when travel was possible it was often only for short periods of time before the next lockdown was announced and these periods did not always coincide in both countries. Since MedCo is part of the healthcare sector, moreover, the firm was facing an incredibly busy and challenging time.

All these factors limited my access, especially to observational data, and consequently imposed certain limitations on the constitutive approach I adopted in the first and second papers. Such an approach (Putnam et al., 2016; Putnam and Nicotera, 2009), particularly in its more recent development in scholarship under the label of the "communicative constitution of organization" (CCO), tends to favor observational and interactional data in-situ (Schoeneborn and Vásquez, 2017). Since I was not able to obtain this type of data due to the Covid-19 pandemic, I tried to remedy this by employing a sequential interview approach in the first paper, further using document data to triangulate my interpretations. I nonetheless acknowledge certain limitations to this approach, driven as it was by necessity. Despite these limitations, I am confident that the overall theoretical anchoring of this project in a constitutive view of organizing was the appropriate choice in the context of the phenomenon I studied. In particular, this perspective helped me discern certain aspects that other approaches might not have exposed to the same extent, particularly regarding insights ensuing from the contested and ephemeral character of embedded SMOs.

Overview of the three papers

In the following sections I present an overview of my three papers that empirically explore how embedded SMOs emerge and are perpetuated within established organizational settings. There are three distinct aspects at the core of each paper in this cumulative dissertation: boundaries, momentum, and collectivity. Paper 1, entitled *A constitutive paradox view of boundary work: How self-managing modes of organizing within hierarchical organizational settings can be sustained*, is co-authored with Dennis Schoeneborn and conceptualizes the question of how to sustain embedded SMOs as a matter of paradoxical boundary work. Our qualitative case study of a self-managing team within MedCo shows how this team was able to perpetuate its SMOs through the dialectical interplay of three main recursively combined communicative practices of *day-to-day nurturing* and two forms of *strategic intra-organizational positioning: exposing and blending in*. The study makes two main theoretical contributions. First, it contributes to research on embedded SMOs by highlighting how a team can navigate between the risks of too rigid or too permeable a boundary, either of which would otherwise probably have led to the discontinuation of the embedded SMOs. Second, it adds to research on paradoxes in organizational boundary work by exploring the constitutive role of paradoxes in maintaining precarious boundaries between distinct modes of organizing. Our study highlights how it is precisely the continuous communicative negotiation of such paradoxes that cumulatively creates and sustains these boundaries over time, thereby enabling the team to uphold their SMOs in an otherwise hierarchical setting.

Paper 2, entitled *From fleeting enchantment to embodied commitment: How bottom-up momentum can emerge and persist*, is a single-authored paper in which I develop end explore the concept of momentum in the context of introducing SMOs. In organization studies, the concept of momentum suggests that the success and sustainability of change efforts depends on the extent to which they gain the commitment of actors to the pursuit of a new path. Previous studies have mainly focused on mapping momentum as it pertains to *planned* change driven from the top down. In my own study, by contrast, I mobilize a constitutive view to elaborate a concept of momentum driven from the bottom up and perpetuated beyond strategic intervention. Grounded in a qualitative study in the context of MedCo, I show how new modes of organizing introduced by the firm's management initially induced short-term momentum that subsequently plateaued and gave way to widespread feelings of ambiguity, critical evaluations and skepticism

towards the initiative. Momentum only recurred as certain actors came to attach their own meanings to the idea and – most consequentially – began developing an embodied sense of commitment to these new modes of organizing. With this paper I thus contribute to the theorization of momentum in organization studies by highlighting the role of embodied commitment in perpetuating momentum, especially from the bottom up. My findings reveal the role of new meanings emerging from individual interpretations of a concept (TeamLoop) first introduced top-down and how these can shift momentum in ways that differ from the path intended by its initiators.

Paper 3, co-authored with Verena Girschik and entitled *Cultivating dispersed collectivity: How community participation matters for employee activists*, is positioned at the nexus of employee activism and alternative forms of organizing. Employee activists who pursue a social purpose at work often encounter considerable opposition and frequently experience frustration as they attempt to drive change from within their companies. In response to such resistance, some may seek support in communities outside their companies that are centered on pursuing the same social purpose as themselves. This paper explores how participation in such inter-organizational communities can shape the ways employee activists experience their change agency. Grounded in an in-depth qualitative study of an inter-organizational community of employee activists (referred to as "The Community" in this thesis), Paper 3 finds that community participation generates "dispersed collectivity". With this term, more specifically, we refer to how cultivating collective momentum and empathic connections in an inter-organizational community can lead employee activists to feel part of a larger movement even when they return to their respective companies. In this way dispersed collectivity enables employee activists to reconceive the courses of action they can viably and meaningfully pursue to drive change. This paper contributes to the literature on employee activism by offering a nuanced view of the potential and limitations of inter-organizational communities for mobilizing and sustaining their members' employee activism.

Table 1: Overview of the three papers

Research Question	Empirical Focus	Concepts	Contribution	Co-author
1. How can embedded self-managing modes of organizing (SMOs) be sustained?	A self-managing team within an international medical technology company	Boundary work; Constitutive paradox	Shows how embedded SMOs can be sustained through boundary work; explores the role of paradoxes in maintaining precarious boundaries between different modes of organizing	Dennis Schoeneborn
2. How can momentum emerge from the bottom up and how does such momentum unfold beyond strategic intervention over time?	The process of introducing self-managing modes of organizing within an international medical technology company	Momentum; Communicative constitutive view	Highlights the role of embodied commitment in perpetuating momentum from the bottom up; shows how new meanings can shift momentum away from an intended path	Single-authored
3. How does participation in communities of like-minded people matter for employee activists and the causes they seek to advance?	An inter-organizational community of employee activists advocating for a more self-determined and meaningful world of work	Employee activism; Inter-organizational communities	Develops the notion of "dispersed collectivity" to explain how an inter-organizational community can help employees reconceive their experience of change agency; provides a nuanced view of the potential and limitations of communities to mobilize and sustain employee activism	Verena Girschik

Conclusion

In this concluding section I show how my constitutive understanding of organizing helped to generate new insights into SMOs, especially in the context of embedded SMOs. I then sum up the overarching contributions of this dissertation to the literature on SMOs more broadly. Additionally, I reflect on some implications for organizational practice and conclude this introduction to my thesis by outlining potential avenues for future research.

Contributions

My dissertation contributes to scholarship on self-managing modes of organizing by shedding light on the specific challenges involved in organizing alternatively when embedded in the established environment of an existing firm. The three empirical studies at the core of this dissertation investigate the various tensions, paradoxes and complexities that arise when trying to organize an embedded self-managing alternative to the norm of a managerial hierarchy. Throughout these papers I apply a communicative constitutive perspective that views communication as processual and generative of organization. Since organization is thus understood as formed through a continuous bottom-up process of negotiating meaning (Putnam and Nicotera, 2009), any organizational reality is never "complete" but always at least to some extent "up for grabs" (Ashcraft et al., 2009: 4). This perspective sees paradoxes and tensions not only as inevitable but as potentially productive and constitutive dynamics in the process of organizing (Putnam et al., 2016). By applying this constitutive view to my empirical settings, my dissertation reveals the many ways in which actors productively (and sometimes unproductively) negotiate embedded SMOs in their efforts to make these modes of organizing serve their purposes.

While each of the three papers makes a distinct contribution by enquiring into a different key aspect of the phenomenon of embedded SMOs, i.e. boundaries in Paper 1, momentum in Paper 2, and collectivity in Paper 3, the papers can also be read jointly to inform wider debates about the democratization of organizations and the potential/limits of embedded alternatives. Below I briefly summarize the contributions of each paper before detailing the overall contributions of the dissertation.

The first paper zooms in on the core challenge of embeddedness that lies in the delicate balancing act required of a self-managing team trying to maintain an intra-

organizational boundary while being part of the same organization. Highlighting the sometimes-paradoxical dynamics that ensue from this balancing act of wanting to be different but having to fit in, this paper shows how persistent and continuous efforts to work with such paradoxes in a productive way over time can eventually prove co-constitutive of the boundary between a self-managing team and the surrounding environment. The second paper is specifically concerned with how the SMOs (i.e. TeamLoop) emerged and evolved at MedCo, showing how TeamLoop gradually developed a bottom-up momentum that was largely detached from the original idea introduced by management. As such, this paper highlights how SMOs are not necessarily manageable in the manner of planned change insofar as the ideas of increased participation and autonomy inherent to SMOs can generate a momentum of their own that lies beyond managerial control. Finally, the third paper explores the importance of inter-organizational communities in sustaining the significant efforts required by individuals to organize embedded alternatives. Developing the concept of "dispersed collectivity", this paper shows how such communities can help actors reconceive their experience of change agency as resilience, emancipation, and/or liberation, thereby ultimately enabling them to persevere. The paper also acknowledges and indicates the limitations of such inter-organizational mobilization across heterogenous contexts.

By evidencing and elucidating the continuous efforts undertaken by persistent actors to sustain embedded SMOs, my three empirical studies at once serve to highlight why embedded SMOs are so difficult to implement and sustain while also providing insights into how this can nonetheless be achieved as an ongoing and effortful accomplishment. Taken together, the findings and analyses of the three studies make two key overarching contributions to scholarship. First, my dissertation as a whole contributes to ongoing discussion on democratic organizing more broadly (see Battilana et al., 2022; Diefenbach, 2020; Honneth, 2023) by providing contemporary foundational empirical research on an aspect of such organizing (i.e. embedded SMOs) that has been underexplored in recent literature (see Krüger, 2023). As noted in the literature review of this chapter, the phenomenon of organizing alternatively from within or in parallel with a dominant managerial hierarchy has not been the focus of much attention in the last decade, with more research focused instead on instances of fully self-managing and alternative organizations (Lee and Edmondson, 2017), as well as studies that have extended our understanding of what constitutes organizing to encompass entirely new

forms of organizing (Dobusch and Schoeneborn, 2015; Puranam et al., 2014). Given the recent predominance of these studies, one might conclude that there are many and much more radically decentralized forms of organizing to be studied today than the form my own case considers – and even that a focus on embedded SMOs may be somewhat outdated. In reality, however, there are probably more people than ever employed in companies that feature some form of participatory structure or "islands of self-management" (see also Krüger, 2023) and almost certainly more so than are employed in radically decentralized or entirely new types of organizations. As common as embedded SMOs may be, however, fundamental questions remain regarding the best way to design more self-managing and participatory structures within larger organizations (Martela, 2023). Moreover it remains somewhat unclear what the democratic potential of such modes of organizing might actually be, including whether and to what extent they can be seen as possible microcosms of greater democratic participation (Honneth, 2023) and whether they might contribute to more sustainable business conduct (Battilana et al., 2022).

Regarding this last question, my dissertation nuances the findings of previous studies conducted in the context of "self-managing teams" (as phenomena that can also be considered embedded modes of self-management or at least as precursors to embedded SMOs). These earlier studies did not view such self-managing teams as a form of organizational democracy but rather as a humanistic albeit fully top-down type of management aimed at improving relationships between management and employees, or at most as a form of post-bureaucratic organizing aimed at increasing efficiency through flexible and adaptable structures (Lee and Edmondson, 2017; see also Battilana et al., 2022). By adapting a bottom-up constitutive perspective on embedded SMOs, however, my own project reveals that employees may indeed perceive such modes of organizing as an opportunity to claim more participation and decision-making authority, potentially beyond the extent intended by management in launching such initiatives. This perception could also be a reason why the studies in my dissertation indicate – contrary to earlier findings on self-managing teams (see Barker, 1993) – that the employees in my case did not seem to feel particularly constrained by the somewhat rigid interaction structures of SMOs and the undeniable peer-control that replaces line-managerial control in the form of specific collective decision-making rules and meeting routines, etc. Instead, my own findings show that these systems of embedded SMOs can also be experienced as invigorating by employees, not least on account of affording them

an opportunity to negotiate their positions and attach their own meanings to what they consider more democratic and meaningful modes of organizing (see also Shanahan, 2023). Of course this is not to deny that it can be onerous for individual participants in embedded SMOs to be always needing to re-negotiate their positions, including the principles they want to apply in their team and what SMOs mean to them, and continuously coping with tensions between their own pursuit of autonomy and the organizational need for some degree of centralized authority, especially in hierarchical corporate settings. As my data show, however, the employees who actively engaged in TeamLoop still managed to carve out space for themselves and for what they considered important to them. Even if not consistently successful in their efforts, these employees persistently tried to make the most of the individual and collective agency at their disposal to strike a delicate balance between resisting hierarchical pressures and remaining loyal to the company. As my data further confirm, these persistent efforts were ultimately a matter of pushing for a way of work they perceived as more meaningful to them, further driven by a desire to instill change from within and potentially to push for other issues important to them. Such participatory agency eventually extended well beyond what the management had hoped to achieve with their TeamLoop project and thus constituted a potential for democratic participation greater than initially intended.

As a second overall contribution, the constitutive perspective I apply throughout my doctoral project helps capture and cast light on the continuous meaning-making processes in which actors engage to co-construct and sustain embedded SMOs, including and especially in the face of tensions long recognized and documented in previous studies of alternative modes of organizing more broadly (e.g. Islam and Sferrazzo, 2021; Langfred and Rockmann, 2016; Stohl and Cheney, 2001). These processes are important to capture, I argue, since we still do not understand well how embedded SMOs can endure despite their inherently paradoxical setup, nor how actors negotiate the ongoing tensions they inevitably encounter when these alternative modes do endure. By viewing organizing from the bottom up, a constitutive approach unveils the continuous re-negotiation of meanings needed to resist dominant modes of organizing, while by highlighting the particular ephemerality of embedded SMOs this perspective also affords intricate insights into the reasons why such modes of organizing need to be continuously re-constituted and re-produced to endure. At the same time, and as my own application of this approach throughout my three studies confirms, a constitutive

perspective on organizing also leaves room for the possibility that the paradoxes and tensions characteristic of embedded SMOs are not necessarily unsurmountable obstacles. With this I do not mean to imply that the best way to deal with such tensions is simply to work *through* them in the sense of surmounting and leaving them behind. Indeed it is questionable whether this would even be possible. Instead, as I argue and hope to demonstrate with my three empirical studies, employees can productively work *with* and negotiate paradoxes and tensions for their own purposes as they see them served by sustaining embedded SMOs. In my own case, the employees who actively engaged with TeamLoop took this initiative as an opportunity to attach their own meanings to a concept introduced by top management, re-interpreting – and thereby transforming – the concept to render it meaningful to themselves. This shows that paradoxes and tensions can become co-constitutive of a mode of organizing by being persistently negotiated and grappled with over time.

With this interpretation, my thesis offers an alternative view to common dismissals of such embedded SMOs as mere tools of "management in new clothes" (see Kieser, 1997) or even forms of "neo-normative control" (Sturdy and Fleming, 2009). Likewise my empirical findings problematize the inclination to paint those involved in embedded SMOs as naïve or as simply falling prey to a form of "cruel optimism" (Berlant, 2011) by striving for something that will ultimately do them harm. Instead my studies show that my informants were typically highly conscious of their position vis-à-vis corporate power and very intentional in the ways they navigated and negotiated their precarious position, revealing them to be far from passive but rather active participants striving to negotiate their own position and co-create and the modes of organizing in which they participated. Again in this regard it is by adopting a constitutive view with its processual understanding of organizing that I am able to show how alternative modes of organizing can be (re)produced alongside a hierarchical norm. Conceptualized as intra-organizational communities of meaning (Taylor, 2009), embedded SMOs constitute distinct modes of organizing that can emerge and endure through persistence and resistance within surrounding hierarchical structures. As my third paper shows, they can also span across organizational contexts and be nurtured beyond boundaries, extending new meanings inter-organizationally.

Practical implications

For managers

Finding the most appropriate organizational structure and mode of collaboration is a persistent concern for managers in any capacity. Self-managing modes of organizing (SMOs) have frequently been introduced within existing organizations over the years to enhance employee engagement, motivation, or increase operational efficiency in complex and unpredictable environments. Despite well-documented challenges, there persists an expectation for a straightforward implementation and seamless integration of such organizational modes with the existing status quo. However, this thesis demonstrates that embedded SMOs do not readily conform to the traditional framework of hierarchically managed organizations. They constitute a distinct mode of organizing with their own boundaries and can develop a momentum that eludes managerial control. This makes them challenging to "manage" in the conventional sense, both during their implementation, as highlighted in the second paper, and once established, as discussed in the first paper. This challenge partly stems from their organizational design and their decentralized approach to task division, task allocation, resource and information provision, which may not be fully compatible with hierarchical expectations. Additionally, as this project has demonstrated, SMOs can hold greater significance to those working with them than merely serving as tools to improve efficiency and address complexity. Even when embedded within larger corporations, SMOs carry a promise of increased participation and a stronger voice in the workplace. This is because once these approaches take root in the organization, employees may embrace and seek to claim the promise of more autonomy and participation that SMOs can provide. Managers are thus advised not to underestimate the (symbolic) power of such modes of organizing. Instead, they could leverage this insight to explore more responsible modes of management. In a political climate marked by growing polarization and the erosion of democracies, business organizations could take on a transformed role in exploring their societal function as microcosms of democratic participation (Honneth, 2023), in addition to or complementing established labor relations.

For employees

As demonstrated in the previous section, although SMOs are often introduced with the goal of advancing business objectives, embedded SMOs can develop a life of their own and a democratic potential which employees can harness to negotiate their own position and have a greater say in issues important to them. The sometimes-cumbersome rules and procedures associated with SMOs, such as shared decision making and collective governance of group rules and roles, can also be liberating. They can serve as tools to continuously negotiate the tensions one may encounter and use them to expand the boundaries of the work mode. Moreover, the (intra-)organizational conversation about SMOs can take unexpected turns and develop its own momentum. However, the thesis also highlights the limitations of such endeavors, underscoring the effort required to organize alternatives from within and to persistently resist co-optation into the corporate agenda. There may be instances when this continuous persistence and negotiation feels futile or burdensome. Indeed, the findings in this thesis emphasize that organizing alternatives and effecting change from within is a long-term endeavor, best achieved collectively by dedicated employees and their management-level allies, as well as through inter-organizational solidarity among individuals supporting each other in a dispersed but collective effort for change and alternativity within and between organizations. The thesis findings indicate that these efforts are not in vain; they can make a difference, however modest or subtle, and contribute to a more self-determined and meaningful work environment. Particularly in an environment where many employers face pressure to provide a fairer and more meaningful work environment, employees need not inevitably accept the status quo. And yet, while there is an opportunity to effect change for oneself and others, some may choose not to invest such levels of commitment and instead seek purpose and liberation elsewhere.

Future research

This project enhances our understanding of how self-managing modes of organizing can emerge and persist within established organizations. Yet, the work on this thesis has also revealed unexplored research avenues, new questions, or areas that went beyond the scope of this project.

First, the project has shown how SMOs may be leveraged to organize alternatives within the (hierarchical) norm and assert greater democratic participation. The findings in papers one and two, in particular, illustrate how members of the organization employ

various tactics to uphold and (re-)claim their self-managing modes of organizing, aligning with recent research on the democratic potential of fully alternative or democratic organizations (Diefenbach, 2019; Jaumier, 2017; Shanahan, 2023). However, the primary focus of this thesis was on understanding how alternatives emerge and can be sustained within established organizations, rather than on the specific issues that such more participatory approaches can address. Future research could usefully explore the democratic potential of these embedded alternatives with respect to advocating for more sustainable business practices (Battilana et al., 2023; Diefenbach, 2020, see also Krüger, 2023). For instance, how can such more democratic modes of organizing contribute to raising awareness about and addressing social and environmental concerns in a more impactful way? Moreover, in what ways and to what extent can these modes of organizing facilitate or potentially obstruct cross-boundary collaboration both intra- and inter-organizationally?

Second, prior research has repeatedly documented how collaborative and alternative modes of organizing can harbour risks of "neo-normative control", which involves excessive instrumentalization for corporate interests and the potential development of a regime of individualization that could ultimately lead to isolation and harm (see Fleming & Sturdy, 2009; Husted, 2021; Mielly et al 2023). Husted (2021) contends that addressing these tendencies involves establishing clear decision-making structures that maintain autonomy and promoting solidarity, all while preserving individuality (see also Husted and Just, 2022). However, these findings on how to prevent the risks of neo-normative forms of control were originally observed in alternative organizations outside corporate settings. My thesis can provide some additional insights on these issues in a corporate setting. Paper three shows, for instance, that upholding SMOs within more hierarchical settings and claiming democratic participation also relied on the co-construction of perceived change agency through collective, interorganizational solidarity. Paper one, on the other hand, demonstrates how the somewhat rigid decision-making structures of SMOs enable the team to negotiate their position in relation to the more hierarchical norms and sustain their mode of organizing over time. Future research could explore how the dispersed collectivity and solidarity, as observed in paper three, combined with collaborative decision-making structures of SMOs can balance the risks of neo-normative control in embedded SMOs.

Lastly, I deliberately conducted in-depth qualitative studies on embedded SMOs because there was limited contemporary research on this specific arrangement. There

are, however, numerous practitioner-oriented case studies available on different kind of embedded SMOs. Accordingly, future research could consider employing methodologies of qualitative meta-analysis (Habersang et al., 2019; Hoon, 2013) which enable researchers to synthesize and aggregate systematically the findings across various in-depth qualitative studies. This methodology could be especially fruitful given the rich and underutilized source of data provided by practitioner-oriented case studies.

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PART II

Paper 1.

A constitutive paradox view of boundary work: How self-managing modes of organizing within hierarchical organizational settings can be sustained

Anna Stöber and Dennis Schoeneborn

This paper examines how self-managing modes of organizing (SMOs) can be sustained within hierarchical organizational settings. Such embedded SMOs are inherently precarious due to the paradoxical tensions between principles of self-management versus the hierarchies in which they are embedded. We conceptualize the question of how to sustain embedded SMOs as a matter of paradoxical boundary work. We draw on this perspective in our qualitative case study of a self-managing team within an international medical technology company. Our findings reveal how this team was able to perpetuate its SMOs through the dialectical interplay of three main and recursively combined communicative practices of *day-to-day nurturing* and two forms of *strategic intra-organizational positioning*: *exposing* and *blending in*. Our study makes two main theoretical contributions. First, we contribute to research on embedded SMOs by highlighting how a team can navigate between the risks of either a too rigid or too permeable boundary, both of which are likely to have discontinued the embedded SMOs. Second, we add to research on paradoxes in organizational boundary work. While prior works have focused on more established boundaries between job roles or professions, we explore the role of paradoxes in maintaining precarious boundaries between distinct modes of organizing. By adopting a constitutive view, our study highlights that paradoxes are not merely a side-effect of boundary work but rather that the ongoing communicative negotiation of such paradoxes creates and sustains these boundaries over time – and that way allowed the team to uphold their SMOs in an otherwise hierarchical setting.

Introduction

Self-managing modes of organizing (SMOs) have long been a topic of interest in organizational research (Lee and Edmondson, 2017; Martela, 2019) and practice (Laloux, 2014; Robertson, 2015). SMOs hold the promise of increasing organizational flexibility and responsiveness, which is of particular importance in times when organizations are confronted with increasingly complex, dynamic, and uncertain environments (Martela, 2019; van den Berg et al., 2021). For employees, such SMOs offer opportunities for more autonomy in how tasks are distributed and decisions are made on a daily basis (Soetens and Huybrechts, 2023; van Baarle et al., 2021), which in turn can help foster a more meaningful and community-based work environment (Henderson, 2021). In recent years, we can observe a renewed interest in this phenomenon. However, this interest in SMOs is countered by practical challenges on how to maintain self-management within otherwise hierarchical organizational settings (Barker, 1993). Embedded in such settings, any shift towards greater autonomy is inherently at odds with the managerial and organizational need for control (Langfred and Rockmann, 2016; van Baarle et al., 2021). In turn, hierarchical forms of control and authority tend to resurface in informal ways or end up being fully reinstated despite all efforts to pursue more collaborative and shared modes of organizing (Barker, 1993; Turco, 2016).

How to sustain SMOs then, despite these challenges, has thus become a matter of growing scholarly interest. However, most of the recent literature has focused on the efforts undertaken by entire organizational entities to operate in less-hierarchical ways in isolation (e.g., Islam and Sferrazzo, 2021; Jaumier, 2017; Soetens and Huybrechts, 2023). Yet, in practice, SMOs are often only implemented within already established and more hierarchical organizations (e.g., Biancani et al., 2014; Diefenbach and Sillince, 2011). In such contexts, organizations or teams that adopt principles of self-management not only need to learn and implement such modes of organizing in the first place but also to defend and maintain their modus operandi recurrently within an intra-organizational environment, especially if they are characterized primarily by a formal hierarchy (see Biancani et al., 2014). Addressing the relative scarcity of research focused on such embedded SMOs, despite the prevalence of this phenomenon in practice, in this study we pursue the following research question: *How can self-managing modes of organizing be sustained within more hierarchical organizational settings?*

To address this question, we approach the phenomenon of embedded as SMOs as a case of paradoxical boundary work (Azambuja and Islam, 2019; Comeau-Vallée and

Langley, 2019; Glimmerveen et al., 2020). This is because any mode of organizing work that is designed to avoid hierarchies as far as possible but which is practiced within a larger hierarchical organization will need to negotiate its boundaries vis-à-vis the intra-organizational environment. Doing, however, so will inevitably also generate paradoxical tensions (Stohl and Cheney, 2001). Boundary work encompasses everyday practices of negotiating, demarcating, and rearranging distinctions between domains of meaning among groups, professions, and organizations (see Langley et al., 2019). We employ a communicative understanding of boundaries as "socially constructed interpretive distinctions" (Langley et al., 2019: 705) whereby boundary work involves "'strategic practical action' for the purpose of establishing epistemic authority [by] drawing and redrawing … boundaries … [through] expulsion, expansion, and protection of autonomy" (Lamont and Molnár, 2002: 179; in Phillips and Lawrence, 2012: 225). In other words, as symbolic delineations between different domains of meaning, boundaries are repeatedly enacted in day-to-day communications. Within the literature on paradoxical boundary work, we, therefore, draw on a constitutive understanding of paradox, according to which paradoxes are not something to avoid or overcome, but rather they are generative of organizational practices (Putnam et al., 2016).

Our empirical investigation of these processes of boundary work is based on data from a qualitative case study of a self-managing team in an HR department within the hierarchical environment of an internationally operating medical technology company in Germany. From these data we identify three main sets of communicative types of boundary work: (1) *day-to-day nurturing* and two types of *strategic intra-organizational positioning:* (2a) *exposing* and (2b) *blending in*. As our findings show, it was only through the dialectical interplay of all three of these practices that the SMO team in our case was able to uphold its boundaries vis-à-vis the surrounding hierarchical organization and thus perpetuate its particular mode of organizing.

Our study makes two main contributions. First, we contribute to research on embedded SMOs (Barker, 1993; Diefenbach and Sillince, 2011) by showing how our case team used strategic practices of boundary work for upholding and defending its work mode within an otherwise hierarchically operating organization. In particular, our analysis emphasizes the importance of complementing day-day-day nurturing practices with positioning practices aimed either at strengthening or downplaying the boundary of an SMO as the situation demands. Such dialectical back-and-forth movements in the team's paradoxical boundary work can help to avoid the ever-present risks of either a

too rigid or too permeable boundary, both of which are likely to have discontinued the embedded SMOs. Second, we contribute to emerging research on the role of paradoxes in organizational boundary work (Azambuja and Islam, 2019; Comeau-Vallée and Langley, 2020; Farchi et al., 2023; Glimmerveen et al., 2020). While these prior works have primarily concentrated on the more stable distinctions between (job) roles or professions, our study builds upon their insights in the context of negotiating the precarious symbolic boundaries between two modes of organizing. Specifically, our study develops these insights from a constitutive paradox perspective (Putnam et al., 2016; Vásquez et al., 2016), demonstrating that paradoxes are not merely a side-effect of boundary work but rather that it is the ongoing communicative negotiation of such paradoxes that creates and maintains these very boundaries (see also Azambuja et al., 2023).

Theoretical positioning

Embedded SMOs and the challenge of sustaining them

SMOs are characterized by a high degree of decentralization of authority, information, and communication in teams and organizations (Diefenbach 2020; Lee & Edmondson, 2017), often associated with the dissolution of certain layers of middle management (Martela, 2023). Self-managing teams thus assume shared responsibility for many traditional managerial tasks such as decision-making and task allocation. They usually also collectively deliberate on the basic principles of self-management (Martela, 2019). Studies of self-management already have a long history in organizational research (e.g., Barker, 1993; Burns and Stalker, 1961; Rothschild-Whitt, 1979).

A key promise of SMOs lies in their potential for improving organizational flexibility and responsiveness, which is of particular importance in times when organizations are confronted with increasingly complex, dynamic, and uncertain environments (Martela, 2019; van den Berg et al., 2021). For employees, SMOs also offer opportunities for exercising greater autonomy in the ways tasks are distributed and decisions are made on a daily basis (Soetens and Huybrechts, 2023; van Baarle et al., 2021). In turn, such autonomy can foster a more meaningful community-based work environment (Henderson, 2021). Notwithstanding these benefits, any shift toward greater autonomy is to some extent inherently at odds with the managerial and organizational need for control (Langfred and Rockmann, 2016; van Baarle et al., 2021). In practice, hierarchical forms of control and authority often resurface in informal ways or end up being fully reinstated despite all efforts to pursue more collaborative and

shared modes of organizing (Barker, 1993; Turco, 2016). How to sustain SMOs then, despite these challenges, is thus an ongoing matter of scholarly interest. Recent research in this stream has confirmed that sustaining SMOs usually depends on the implementation of principles and processes that support the preservation of shared authority and control as well as a strong commitment to SMOs among employees, at the same time (e.g., Soetens and Huybrechts, 2023). Although there is a strong tendency for hierarchical control to (re-)emerge in any organization over time (Barker, 1993), people's day-to-day efforts to maintain and protect alternative work modes play an important role in resisting such hierarchization (Diefenbach, 2019). Islam and Sferrazzo (2021) or Jaumier (2017) showed that such efforts are more likely to succeed when the members of self-managing teams are trained in democratic skills and critical thinking.

Formal principles and employee commitment as such, however, are not sufficient to sustain SMOs when they do not operate as stand-alone forms of organization but instead are embedded within hierarchical organizations. As argued above, the problem of pervasive hierarchical control is likely the be more pronounced in contexts where bureaucratic-hierarchical and self-managing modes of organizing are combined within the same organization (e.g., Biancani et al., 2014; Diefenbach and Sillince, 2011). In the context of such "embedded SMOs" organizational units or teams operating in self-managing ways not only need to adopt and remain committed to SMO principles and processes but also recurrently position and negotiate their modus operandi in accordance with the very different hierarchical logics of the environment in which they operate.

Embedded SMOs as a case of paradoxical boundary work

Throughout this study, we make the case for considering the phenomenon of embedded SMOs as a case of boundary work (Langley et al., 2019), in which teams have to maneuver paradoxical tensions to uphold their mode of organizing. In line with Putnam et al. (2016), we understand paradoxes as "contradictions that persist over time, impose and reflect back on each other, and develop into seemingly irrational […] situations because their continuity creates situations in which options appear mutually exclusive, making choices among them difficult" (p. 72; see also Jarzabkowski et al., 2019; Smith and Lewis, 2011). Research shows that paradoxical tensions inevitably arise when endeavoring to uphold modes of self-management within a larger hierarchical system (e.g. Ashcraft, 2001; Stohl and Cheney, 2001). Although greater independence from an

overarching organization can make it easier to sustain an embedded SMO, including by enabling teams to avoid many issues of compatibility and coordination (Martela, 2019), even highly independent teams must actively manage reciprocal relationships with the organization to which they belong (Gittell and Douglass, 2012). Accordingly, embedded SMOs face the challenge of protecting their intra-organizational boundaries to keep their particular mode of organizing intact (see Schreyögg and Sydow, 2010). At the same time, they need to ensure that the boundaries of their SMOs are sufficiently permeable to facilitate compatibility and collaboration with the organizations in which they operate (see Kellogg et al., 2006).

Within extant scholarship, we argue that communication-centered understandings of boundaries and boundary work as symbolic distinctions between different domains of meaning (Lamont and Molnár, 2002) are especially suited for generating insights into the phenomenon of embedded SMOs. This is because actors in self-managed teams face the ongoing challenge of maintaining and negotiating their particular work mode as a distinct domain of meaning vis-à-vis other domains of meaning prevalent in their surrounding organization (e.g., Ashcraft, 2001; Diefenbach, 2019). Proceeding from the premise that such symbolic boundaries have no permanent existence but need to be continuously renegotiated and reinstantiated over time, communicated-centered approaches are largely compatible with the original conceptualization of boundary work as developed by Gieryn (1983) in his study of the discursive practices used by scientists to demarcate the area of science from non-science. In applying this approach to embedded SMOs, therefore, we first must identify what it is that characterizes SMOs as a particular domain of meaning.

While SMOs are ultimately concerned with the same kinds of basic problems as hierarchical organizations (such as task division, task allocation, etc.; Martela, 2019), they differ in how they deal with these problems and in the vocabularies they use to give meaning to these basic problems. Unlike more hierarchical organizational arrangements, self-managing teams tend to assume shared responsibility for matters such as decision-making and task allocation that would typically be managerial responsibilities in a hierarchical setting. Moreover, SMOs often feature temporary role structures that can be revised as necessary through formal governance processes and specific meeting routines (Diefenbach, 2020). Because these role structures are not hierarchically defined, they may not appear in employment contracts or be visible on official organizational charts, thereby potentially rendering such roles more vulnerable to contestation (Arazy et al.,

2016). The boundaries of embedded SMOs are thus inherently precarious, meaning their particular modus operandi requires continuous efforts at justification (Reay et al., 2006).

A constitutive view of paradoxical boundary work

Accordingly, we suggest drawing on studies that have explored the link between emerging paradoxes and boundary work. For example, in a recent ethnographic study of negotiations around citizen engagement in a professional care facility, Glimmerveen et al. (2020) analyzed different types of boundary work, finding that efforts to transcend boundaries to include outsiders and/or improve collaboration can – paradoxically – have exclusionary effects. Similarly, Farchi et al. (2023) have shown how initiatives to remove or soften boundaries between professions in healthcare teams sometimes have negative consequences in practice, while strengthening boundaries can improve coordination in interprofessional collaboration. Complicating this latter finding, Comeau-Vallée and Langley (2020) demonstrated that while strengthening inter- and intra-professional boundaries within a healthcare context can support collaboration among high-status groups, such boundary work also runs the risk of further marginalizing lower-status groups. Azambuja and Islam (2019) have found that such paradoxical tensions can also be experienced within individual professional roles, revealing in their study of middle managers how individual practices of role-specific boundary work can evoke contrary experiences of emancipation and alienation. In sum, prior scholarship has generated important insights into boundary work, for instance by showing how efforts of removing or downplaying boundaries can paradoxically lead to reinforced boundaries between professions or groups. However, while these extant works have primarily examined more strongly institutionalized boundaries thus far, such as between different professions or job types, our study complements these works by exploring the more precarious boundaries between different modes of organizing (incl. embedded SMOs).

Since embedded SMOs face the need to continuously bring forth the very boundary that makes their work mode distinct from the rest of the organization (as symbolic demarcations between different domains of meaning), we suggest drawing on approaches that emphasize the generative capacity of paradoxical constellations through continuous processes of meaning negotiations. More specifically, we propose turning to a *constitutive view on paradox* that has gained considerable attention in organization studies in recent years (see Fairhurst and Putnam, forthcoming; Panayiotou et al., 2019;

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Putnam et al., 2016). From a constitutive view, practices of boundary work cannot be considered as separate from boundaries, since the paradoxical character of these practices is understood as generative of boundaries (e.g., Panayiotou et al., 2019; Putnam et al., 2016; see also Azambuja et al., 2023).

Communication has a pivotal role in this perspective in that it makes paradoxical tensions salient (Putnam et al., 2016: 14). In turn, the perpetuation of organizational phenomena, including their boundaries, depends on continuous communicative efforts to fix meanings (thereby rendering boundaries more rigid) and efforts to open up meanings (thereby rendering boundaries more permeable) (see Vásquez et al., 2016). The dialectical interplay of these ongoing efforts is key for sustaining boundaries since accentuating movement either towards greater permeability or rigidity could lead to boundary collapse. In the case of embedded SMOs, boundary collapse can thus ensue either from the emergence of an overly rigid boundary between an SMO team and the overarching hierarchical organization in which it operates, thereby creating the risk of the team's lacking sufficient legitimacy to continue its peculiar work mode; or the emergence of an overly permeable boundary, which creates the risk for the team to become ultimately indistinguishable from its surrounding organization. In either scenario, an embedded SMO would likely cease to exist.

Empirical context and methods

Research setting

Our case setting is a German multinational medical technology company that has been experimenting with SMOs since 2017. This case offers an opportunity to study how SMOs can be sustained in a company that is more than 180 years old that has traditionally relied primarily on hierarchical organizational structures. Furthermore, the self-managing team we studied had just recently come under significant pressure to defend its particular mode of organizing. We were aware of this development because the first author of this paper had previously been a member of the same team until July 2019 and stayed in touch with one of the team members since leaving the organization. This was how the first author eventually heard about the new Head of Department (HoD) and the team's struggle to advocate for its SMOs, which prompted our idea of empirically following the team during this precarious period.

One of the two departments piloting SMOs within the case firm since 2017 was the Corporate HR Department with its three teams, each of which had line managers but

no formal substructures. The introduction of SMOs in these three teams included the use of specific meeting routines to facilitate team-based decision-making to enable decentralized task allocation as well as ensure a high degree of information transparency. Adaptable and autonomous SMO roles were introduced instead of "regular" job functions, with the aim being to enable the teams to design and adapt their structures according to their specific needs and purposes. After about a year of experimentation, however, two of the three teams reverted to their previous line hierarchy and abandoned most of the SMO tools they had piloted except for certain specific meeting routines, having reached the conclusion that self-management was impractical in the context of these teams' more technical and routine tasks. The focus of our study is thus on the third team, which has gradually expanded its degree of self-management ever since its establishment. The persistence of this third team in pursuing self-management was motivated primarily by the dedication of certain team members to continuing to experiment with SMOs and their interest in further advancing these modes of organizing, also with the aim of creating a meaningful work environment. Beyond such personal motivations, however, self-management turned out to be also more practical for this team's project-based work.

Initially, the team used SMOs primarily to improve communication and informational flows and for distributing tasks more autonomously among members. At this early stage, the team combined autonomous modes of organizing with the continued presence of a line manager with final decision-making authority. When the line manager went on parental leave in mid-2018, the team members succeeded in convincing the HoD at that time to allow them to test a more comprehensive mode of self-management without any formal team leadership role during the line manager's absence. For almost two years thereafter, the team cultivated a high degree of autonomy. With the arrival of a new HoD in May 2020, however, the team was confronted with the demand to reinstate a line manager to ensure compatibility with the surrounding organizational hierarchy. The team resisted the pressure to reinstate a line manager throughout the period of our study by convincing the HoD to install two SMO lead roles to assume traditional managerial tasks in a shared leadership capacity. These SMO lead roles were filled by team members who were elected by the team itself and could likewise be voted out. The team jointly discussed the profiles of these two roles, agreeing that one role should be more strategically focused on maintaining relationships with stakeholders outside the team, including reporting to the HoD, whereas the other should focus mostly on

personnel development within the team. The team was initially granted a "grace period" from October 2020 to April 2021 within which to convince the HoD of the feasibility of the team's SMOs. (See Appendix 1 for a chronological overview of events in the case study).

Data collection

Our core phase of data collection took place from the time when the team's SMO roles were initially elected in Oct. 2020 until Nov. 2021. All-in-all we grounded our findings in 34 instances of interview data that were collected in different formats. As one main type of data, we closely followed the two newly elected SMO lead roles throughout the whole period, since these actors were the ones navigating boundaries both in their roles within the self-managing team and in their contacts with top management and other stakeholders. We interviewed the team members who fulfilled these roles repeatedly in sequential interviews to collect in-depth data on their experiences and the coping strategies they used to defend and maintain their mode of organizing during this critical period. This approach enabled us to follow the two SMO lead roles more closely than would have been possible through one-off interviews, especially in the context of the Covid-19 pandemic at the time. Spread out as a conversation of several hours over multiple sessions, sequential interviews allow experiencing the lifeworlds of interviewees and to inquire into the "how and why" of the phenomenon under investigation in great depth (Crawford et al., 2021; Hermanowicz, 2013). In total, this resulted in conducting 15 sequential interviews with the incumbents of the SMO lead roles. These data were further complemented in some cases by voice messages sent by one of the interviewees concerning particularly notable situations that unfolded during the study period (13 voice messages in total).

To complement this data, we additionally conducted 6 one-off interviews with other members of the team and important stakeholders outside the team, including the HoD and neighboring teams' line managers, eliciting their perspectives on the team's development and their perceptions of how the team had managed to sustain SMOs over time. All interviews were conducted in the spirit of a curious listener asking open-ended questions and probing the interviewees to explain exactly what they meant. To gain a better understanding of the case, we additionally collected around 250 pages of documentation and recordings from team meetings and presentations about the development of the team's structure. The interviews were conducted in German and the

documents were also written in German. We analyzed the material in the original language. See Table 1 for an overview of all the data of our case study.

Our understanding of the team's context, history, and specific mode of organizing was further enriched by drawing on the first author's own experience as a former member of the same team from 2016–19. The first author had left the company for academia long before the arrival of the new HoD. Based on this previous insider experience, however, this author was able to understand the organization's jargon, its micropolitics, and the possible meaning of certain events without needing to navigate the difficulties of combining a dual role in academia and the organization as in the case of full insider research (see Brannick and Coghlan, 2007).

Table 1. Data overview

Data Source	Type of Data
Recurrent conversations with occupants of the two elected SMO lead roles (Oct. 2020 – July 2021)	Conversations with elected external SMO lead role (Charlotte): interviews (7), voice messages (13) Conversations with elected inside SMO lead role (Marc): interviews (8) (15 interviews, 13 voice messages, 750 min. in total)
Interviews with other relevant actors	Interviews with team members (Alice, Daniel, Marie) (3). Interviews with neighboring team managers (Martin, Peter) (2). Interview with Head of Department (HoD) (1). (6 Interviews, 315 min. in total)
Observational data	Meeting recordings (65 min. in total)
Documents and archival data	Role documents Internal presentations Meeting documentation (ca. 250 pages in total)
Background data (collected from 2017-2018)	Fieldnotes from ~50 hours of workshop observations; data only used for context understanding

Data analysis

As a first step in our data analysis, we conducted inductive coding following the tenets of grounded theory (Charmaz, 2006; Gioia et al., 2013), applying open coding to our data

from the interviews, documents and reflexive memos written after each interview. Our iterative process of analysis began while the data collection was ongoing and while the team was still in a phase of experimentation. Given the first author's familiarity with the organizational context and the specific processes and vocabulary of the team, this author took the lead during the initial coding process. The second author took the role of an outsider, reflecting on and challenging the emerging findings to ensure sufficient critical reflexivity. We conducted this initial coding with an open mind, seeking to identify the various practices and tactics employed by the team to protect their SMOs, and made extensive use of the reflexive memos to reflect on emerging themes in the data. As we continuously compared emerging themes with potentially apt theoretical concepts, the importance of intra-organizational boundary work emerged inductively early in the process.

In the second step of our analysis, after engaging with some potentially relevant literatures, we proceeded with more focused coding aimed at identifying the practices undertaken by the team to sustain their SMOs within an otherwise hierarchical setting. This move could be described as "transitioning from 'inductive' to a form of 'abductive' research" (Gioia et al., 2013: 21), with our interpretation of data and theory proceeding in ever closer parallel. Throughout this analytical process, we concentrated especially on identifying *communicative* practices of boundary work. This focus further ensured the consistency and compatibility of our findings with our theoretical understanding of (intra-)organizational boundaries as both subject to and constituted by recurrent negotiations of meaning. We eventually arrived at a total of 22 first-order concepts (Gioia et al., 2013) that helped us understand how the team engaged in practices of communicative boundary work to sustain their SMOs. We then aggregated these concepts into nine second-order themes, moving toward higher levels of abstraction.

In a third and final analytical step, we developed three aggregate dimensions comprising the forms of boundary work undertaken by the team members to maintain their SMOs, labeling one of these dimensions as "day-to-day nurturing" and the other two as "strategic intra-organizational positioning" in the form of "exposing" and "blending in" (see Figure 1, see Appendix 2 for a data table). Throughout the different iterations of our analysis, we discussed our findings on several occasions with our respondents as a means of member checking to ensure we had not imposed interpretations on the data (Lincoln and Guba, 1985).

Figure 1. Data structure

1st Order Concepts	2nd Order Themes	Aggregate Dimensions

- Sharing a joint purpose statement
- Negoting roles and role descriptions
- Updating documents in governance routines

→ (Re-)codifying SMO terms

- Upholding meeting and interaction routines
- Fostering commitment to SMO in individual interactions

→ Enacting SMOs

- Anticipating hierarchical intervention
- Anticipating challenges within the team
- Initiating own proposals to pre-empt challenges

→ Anticipatory Buffering

→ 1: Day-to-day nurturing

- Using SMO vocabulary outside team
- Invoking SMO roles outside team

→ Invoking SMOs in front of others

- Introducing SMO meeting routines in other contexts
- Presenting SMO lead roles as an alternative to role of line manager
- Using SMO roles structure in new virtual teams

→ Spreading the word about SMOs

- Compensating missing resources through flexibility of SMO
- Proving the performance of SMO

→ Demonstrating the practicality of SMOs

→ 2a: Strategic positioning: Exposing

- Acknowledging hierarchical work-modes as equally valuable
- Reflecting on the compatibility of different modes of organizing

→ Displaying acceptance of other modes of organizing

- Reflecting on own use of SMO vocabulary
- Paraphrasing SMO vocabulary
- Translating SMO vocabulary

→ Self-censoring SMO vocabulary

- Adapting role structure to look more traditional to the outside
- Using a traditional recruiting process in addition to SMO role election process

→ Camouflaging structural differences

→ 2b: Strategic positioning: Blending in

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Findings: Practices of paradoxical boundary work to sustain embedded SMOs

Our presentation of key findings is structured according to the three main sets of boundary work practices we identified: (1) day-to-day nurturing practices and two types of positioning practices of (2a) exposing and (2b) blending in.

(1) Day-to-day nurturing

We identified a large cluster of practices all concerned in one way or another with *nurturing* the communicative boundary between the embedded SMOs and the surrounding hierarchical organization in day-to-day activities. This cluster can be further broken down into three main sub-practices of day-to-day nurturing: (re-)codifying SMO terms; enacting SMOs; and anticipatory buffering.

(Re-)codifying SMO terms. When the team first started organizing itself in a self-managing way without a line manager, no prescribed structures or processes were in place for prioritizing and allocating tasks or for communicating the team's work. Hence, the team employed procedures commonly used in SMOs to develop its structure and to elaborate the intricacies of its work mode (internal document, Nov. 2018). These procedures were repeatedly employed to (re-)codify the terms and the structure with which the team was to operate according to adaptable but fairly stable written statutes (internal documents May 2019 and June 2020).

The goals of the embedded team were specified in a "purpose statement" (internal document, June 2020). As Charlotte recollected (interview, Nov. 2020): Although seldom used in everyday work, the document was considered important for giving the team "a really clear inner coherence … geared towards the structure and how to preserve it. The purpose [statement] plays a role in that context, even though we're not always aware of it. But we know … quite precisely… why our [team] exists and what we contribute." It was on the basis of this guiding statement that the team, in consultation with the HoD, specified the topics and priorities of its area of responsibilities and clustered them into topic-specific roles. These roles were written down and could be adapted if needed. Each team member filled one or several roles. Tied to the purpose statement, these roles played an important part in maintaining shared authority and control within the team:

> It has become our habitus to work roles-based and I believe we don't need anything else at the moment [to maintain SMO] except for working towards further institutionalizing what we're already doing. (Alice, interview, July 2021)

Having the flexibility to adapt those SMO roles also helped the team to deal with some of the tensions that inevitably arose when practicing self-management within the managerial hierarchy of the overall organization. We started our data collection at a time when the team had recently negotiated a compromise solution rather than being assigned a formal line manager, instead establishing two elected SMO lead roles that would share typical managerial tasks. One of these roles was more outward-facing, explicitly including the responsibility to "protect the autonomy of [the team]" (Role description, Sept. 2020), while the other was more inward-facing and included some formal authorizations the team had not previously been able to integrate into the SMO logic:

> The new role we've developed [referring to the second lead role in the team] helps us a lot, because with it … we can pull this decision-making power a little more into the team because we worded it in a way that it includes things like salary negotiations, budgets for personnel development measures, and approvals in the [HR management] system. (Marc, interview, Oct. 2020)

The codified terms of the team's mode of organizing, including not only its purpose statement and role descriptions but also its meeting and decision-making routines, could always be recodified in regular "governance meetings". Prior to these meetings, each team member was allowed to add topics for discussion to a written list. As the importance attributed by the team to such governance meetings implies, nurturing SMOs was not only effectuated by regularly (re-)codifying the terms of self-management but also by efforts to integrate these in day-to-day activities.

Enacting SMOs. One important way in which the team nurtured and strengthened the foundations for self-management was by enacting the codified terms underlying these work modes in day-to-day activities such as team meetings. Conducted according to an interaction routine designed to enable all team members to bring up any matters they considered important and to reach shared decisions if needed, team meetings proved a crucial foundation for enacting SMOs. For example, the team member facilitating each meeting would begin by asking the other members to gather any topic they wanted to discuss on a whiteboard and then clustered them by urgency (team meeting, June 2021). As demonstrated in the following quote, this interaction routine was regarded as crucial not only for enacting the team's SMOs but also for flexibly distributing incoming tasks among the other team members, who referred to this process as "pulling a task":

> So, there's a structure. I mean the check-in [meetings] in the morning, the team meetings, but also the governance meetings. And that's a structure where you try to *live* self-management … But it's also where topics come in and can be pulled. (Marie, interview, April 2021)

The way these meetings were facilitated by different team members on a rotating basis was also considered important for upholding the team's shared authority:

> I think this [facilitation] role is more and more important in a complex work environment. Where a manager cannot simply pass on orders, because we just work differently. … We need another kind of authority that ensures that these spaces for exchange can arise, that a diversity of voices is heard. (Charlotte, voice message, March 2021)

This recurrent enactment of SMO practices in team meetings inevitably relied to a great extent on the commitment of individual members, as Daniel reflected:

> I want this, I identify with this. This is exactly how I want to work and I'm willing to stand up for it. I think that's important, if a team like ours wants to endure within the other [more hierarchical] structures. (Daniel)

Indeed, it was to foster such motivation and commitment among its members, that the team's interaction routines were designed to allow ample space for addressing individual concerns, including by beginning each team meeting with "check-ins" enabling individuals to briefly share how they were personally getting on:

> I think it's important for the team … To hear each other briefly every morning and briefly say 'How are you? What are the main topics? What are you working on?' I think this is very important for the … emotional sense of belonging. (Marie)

Despite these efforts to foster shared commitment, individual commitment nonetheless faltered on occasion, with team members sometimes reverting to hierarchical modes of organizing, such as bypassing the team's SMO role structure or failing to take responsibility for their own tasks. In seeking acceptance for their decisions in the line hierarchy, for instance, some team members still consulted the HoD on certain issues, even though the responsibility for these topics had by then been explicitly allocated to one of the newly created SMO lead roles within the team:

> [One team member] has applied for a temporary position [in an inter-organizational project] and has not shared that with [the inner lead] role …but went directly through [the HoD]. Whatever the reason, of course, it immediately led [the HoD] to say 'Well, if it runs through me anyway, that's not really how the role was meant to be, right?' And that just shows how important it is to trust [the roles]. (Marc, March 2021)

As Charlotte reflected, facilitating mutual feedback among members and reminding each other of their shared commitment to the team's self-imposed mode of organizing was especially important as a form of nurturing to counter any instances of such faltering

commitment: "If someone falls back into old hierarchical patterns, then … it's addressed, there is feedback, and they'll be asked to work according to [our SMO] principles in the future" (Charlotte, Nov. 2020). In sum, codifying and enacting the team's SMO principles was not sufficient by itself to sustain its embedded SMOs though, since the team also had to take account of its environment and any decisions or developments that might challenge its work mode.

Anticipatory buffering. The team members continuously strove to anticipate any developments that might jeopardize their SMOs in a pre-emptive way by what we term "anticipatory buffering". When asked which instruments of SMO were important to maintain the team's SMOs over time, for example, one interviewee emphasized the importance of being "predictive" in the sense of being "able to anticipate needs to a certain extent and to be able to adapt to them quickly" (Marc, March 2021). Such buffering became especially important in light of rumors that the HoD was considering re-installing a line manager for the team. As recollected by team-member Daniel: "It wasn't that it was brought to the team's attention, but the team increasingly sensed that there was a desire [to reinstall] a line manager … and we resisted. Because we wanted to show, from our perspective, what an alternative might afford." To pre-empt this potential hierarchical intervention, the members discussed their options in a team meeting and came up with their own proposal:

> …so that under no circumstances do we get a manager. We then started a discussion and worked out a strategy or battle plan and then came up with these two roles. And then Charlotte went up to [the new HoD] and tried to explain it to him and asked him if he'd be open to trying it. So, it was exciting. (Marie)

Thereafter, the team employed the same tactic of anticipating and pre-empting unwelcome developments with proposals that reflected their own desired work modes in other contexts:

> This approach really proved us right when we faced the last two bigger issues. Both last year, when we said we want SMO lead roles, because it somehow pre-empted the need [for a line manager], but also now. We're making a self-managed structural proposal [for the department] because we could sense that [the HoD] and [the CEO] are thinking along those lines. (Marc, Feb. 2021)

Although these three everyday practices (codifying terms, enacting SMOs, and anticipatory buffering) were effective in nurturing the team's boundary from *within* the team, other external-facing forms of boundary work were also needed and undertaken to constitute, consolidate and sustain the symbolic boundary between the self-managed team and the hierarchical organization within which it was embedded. Such work

included various practices related to buffering that we identified as types of "intra-organizational positioning".

(2) Intra-organizational positioning of SMOs

We identified two distinct types of practices undertaken by the team as a means of positioning the boundary between its SMOs and the institutional environment. These alternate practices of "exposing" and "blending in" were especially evident in instances when the team members either felt emboldened to expose their work mode to others or conversely felt pressured to blend in with their hierarchical environment.

(2a) Exposing

We use the term "exposing" as a form of positioning to denote a set of communicative practices whereby the SMO team aimed at explicitly "signaling" and differentiating its own mode of organizing from the surrounding organization. These practices of *invoking the team's SMOs in front of other actors, spreading the word about SMOs*, and *demonstrating the practicability of SMOs* were performed selectively at times when the members of the team spotted opportunities to attain wider acceptance for their mode of organizing and when they felt sufficient confidence to undertake such efforts.

Invoking SMOs in front of others. One of the main ways in which the team members tried to attain greater exposure and thus wider acceptance of their SMOs was by making their self-management practices explicitly visible when collaborating with other actors from the surrounding organization. Such positioning efforts implicitly depended on a certain degree of confidence among the members of the team in their SMOs, as exemplified in Daniel's optimistic assertion that "I believe we can positively surprise [others in the organization] with the way we work". In relation to such boundary work, Charlotte (Dec. 2020) stressed the importance of developing a "good purpose statement" that could be used as a point of reference in interactions with other intra-organizational stakeholders, i.e. "that we can refer to when there are demands put on us that we can't meet or simply do not want to meet." For example, Charlotte in the same interview recalled a situation when a team member had invoked SMO practices to navigate the request of an internal client:

> Sometime in the summer, Marie got an assignment to develop a mentoring program. … And she talked to [the internal client] and said, so to speak: 'Thank you for the offer. I'll take this with me to the team and then post it for "pulling" because that's

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our way of working, and we'll get in touch with you when we have someone who feels responsible for the task.'

Invoking the particularities of their SMOs in these ways was a means for team members to re-instantiate the symbolic boundary between the SMOs and the surrounding organization. Such invocation was observed by Martin, the manager of a neighboring team, who recalled how Charlotte and Marc would invariably insist on referring to their team's participatory SMO decision-making process during meetings with the HoD: "So this idea that you can just tell the [self-managing] team what to do and they do it … I believe that doesn't really work in their team … They'd tell you that they'd like to hear the other team members' opinions first." As Martin wryly reflected, this approach "maybe sometimes leads to irritations", though such tension no less effectively served the function of outwardly reifying the symbolic boundary between the team and other actors.

Spreading the word about SMOs. In other instances, the team members not only referred to their SMO practices but sought to share and spread these practices to others in the organization, including by involving organizational actors from outside the team in SMO meeting routines and by implementing these modes in other contexts. For instance, Charlotte described how she had actively tried to "find allies" to advocate for such roles in discussions about a new global HR structure, explaining how this was "because I am convinced that the organizational structure can only be effective if there are roles which are able to collaborate in a different way than before" (Dec. 2020). As the HoD reflected, the team's eagerness to share SMO practices with others "came across as almost missionary, which makes sense when you are also trying to carry it into the organization. You can also almost sense it in their habitus and vocabulary."

On the one hand, then, these forms of "exposing" the team's SMOs seemed to serve the purpose of making the team's practices more legitimate and acceptable by raising awareness in the surrounding organization. On the other hand, greater exposure of the team's boundaries within the organization also lay the team and its work style more open to scrutiny. This was the case, for example, when the new HoD attended a team meeting and the members decided to showcase their meeting routine to him:

> In the team meeting, for example, we did a quite extensive check-in. And I think [the new HoD] didn't like it much, because we somehow ended up taking a quarter of an hour for the check-in. (Marc, Oct. 2020)

Such time-consuming routines did indeed test the patience of the HoD:

> The compatibility of [the team's] language and their habitus is not always straightforward in an international corporation. When I'd just started as HoD and we did a 20-minute check-in at the beginning of the meeting and I only had an hour, I eventually had to ask them: 'So when do we get started?'(HoD)

As this incident highlights, the team's efforts to diffuse and include others could sometimes backfire, alienating the very actors they wished to win over. For example, Peter (neighboring teams' manager) reflected that the SMO team was "a separate world that was created that's not very compatible with the other departments – that's my impression." Interestingly, the HoD surmised that some of the negative reactions evoked in the wider organization by the team's exposing practices were not necessarily rooted in the complete incompatibility of the team's modes of working but stemmed at least partly from the language used by the members of the team and how they carried themselves in intra-organizational interactions:

> Those are objections that are perhaps more targeted against the *habitus* than the mode of working. So, not against the way decisions are made but the type of language. I think that's where the approach has come under pressure.

Perhaps the most consequential risk involved in the team's showcasing and exposing of its SMOs was that any failure in these efforts could result in other actors perceiving such modes of self-organizing as unsustainably time-consuming and inefficient.

Demonstrating the practicability of SMOs. In their efforts to counteract perceptions of the team's SMOs as inefficient, the team members employed a third form of exposing practice aimed at underscoring the practicability of its mode of organizing. These efforts ensued in part from a recognition among the team members that their embedded SMOs required a high degree of continuous interaction and coordination and that their governance routines in particular were often perceived as slow and inefficient. As Charlotte acknowledged:

> Such governance processes take time. And that … sometimes gives others the impression we're inefficient. Hierarchy is much faster because then you just tell someone what to do and they say: 'Ok, I'll get it done!' Self-management can have this speed too, but in other ways (Nov. 2020).

For this reason, many members of the team we interviewed felt it was of the utmost importance to prove the work they were doing was efficient and of a high quality by making this visible to others:

> I actually also believe that you really have to deliver, to put it bluntly. The output of our [team] must be visible to the other teams. And then, if we perform … then I think [our work mode] will be accepted. And I think it's being accepted at the moment

> because when we have these department meetings, those who always say something
> and contribute are mainly from [our team]. (Marie)

Our interviewees also expressed a distinct sense of being held to a higher standard than other teams within the wider organization. In Marc's words: "It's a bit like for women – having to work twice as hard to be seen and always needing to have good or even outstanding results" (Oct. 2020). To these team members it seemed whenever anything went wrong or a process proved inefficient that the problem was blamed on their mode of work rather than other factors. This was why it was considered of the utmost importance for the team to show "we achieve set goals, but we do it in a different way, because it would be the worst-case scenario if we said 'We'll do it differently than what you know' but then we weren't able to deliver" (Charlotte, May 2021). In this sense, the team's practice of exposing as a form of positioning carried significant risks, since too much exposure of their SMOs to the surrounding organization could paradoxically lead the team into a performance-pressure-trap, i.e. a vicious cycle in which the team felt it necessary to outperform expectations in order to deal with the increased scrutiny prompted by their own boundary work.

(2b) Blending in

In periods when the team members felt under strong pressure to legitimize their SMOs and prove the compatibility of these work modes with the surrounding hierarchical organization, they engaged in alternative forms of positioning work that can best be described as practices of *blending in* with the hierarchical norms prevalent in the firm. Such work involved careful efforts to render the symbolic boundary between the team's SMOs and other modes of work in the organization less conspicuous, including by *displaying acceptance of other modes of organizing*, *self-censoring SMO vocabulary*, and *camouflaging structural differences*. As our analysis showed, these efforts were typically undertaken with the aim of protecting the team's autonomy in the face of increased scrutiny of their SMOs by downplaying rather than highlighting differences in work modes, i.e. by pursuing a positioning tactic completely contradictory in its aim to that of "exposing" the team's SMOs.

Displaying acceptance of other modes of organizing. As previously noted, the head of the department in which our case team was embedded expressed certain misgivings about the almost "missionary" spirit of the team in practicing and propagating its SMOs. In our interviews, the HoD emphasized that while the team members were "very proud

of what they had developed", their enthusiasm for SMOs could be alienating for other organizational actors. Aware of this potential criticism, the members of the SMO team regarded it as crucial to prove they were also accepting of other modes of organizing and did not regard SMOs as the "gold standard". For example, Marc stressed that it was "really important not to get this ivory tower issue" whereby the team risked being perceived as "out of touch, in a world of our own … like a separate microcosm" (Oct. 2020). Similarly, Alice emphasized that "I really don't want to religiously promote SMOs – you know, like a Christian who doesn't want to understand [other religions]." As Marc explained, the team members strove to counter any such negative impressions by making conscious efforts to display their acceptance of other modes of organizing and to acknowledge them as equally valuable:

> It's important, I think … to show that no way of working is better or worse. Whether you're self-organized or hierarchically organized as a department, we have to convey this attitude to our environment. (Oct. 2020)

Contrary to the positioning tactic of exposing their SMOs, the team's efforts to display acceptance of other work modes thus entailed purposefully avoiding any attempt to convert others while downplaying differences between the team and the wider organization.

Self-censoring SMO vocabulary. The specific self-management vocabulary used by the team could be an especially conspicuous marker of its particular mode of organizing. As noted by the manager of the neighboring team, Peter, "It's a very peculiar vocabulary, and sometimes you simply can't keep up unless you're in touch with it on a daily basis [laughs]". The team members themselves also noticed that the use of SMO vocabulary in contexts outside the team could sometimes lead to negative reactions from other organizational actors. While working in such contexts, for example, Marie noted how colleagues outside the team would immediately point it out if she forgot to adapt her vocabulary:

> So, when you say: 'I have a tension' there are people who start laughing. … There are formulations that only we use, and when I use them by accident [in non-team contexts] then people laugh at me and say: 'Did you have a team meeting again?'

Beyond merely being different, the use of SMO vocabulary could sometimes lead, as Charlotte reflected, to the team members "being misunderstood – or maybe it's just not clear what we mean" (Jan. 2021). Marc also emphasized the antagonism that was sometimes expressed towards the self-management discourse used by the team:

> I once got lectured for 45 minutes by an internal client about how incompatible our choice of words is! So it's really important to be careful how you word things. Because it can also be a huge opportunity for us. (Feb. 2021)

In stark contrast to instances when team members deliberately used SMO language to highlight their work mode, team members would also often deliberately and pre-emptively self-censor their use of SMO vocabulary to avoid alienating or irritating others, thus bridging language boundaries:

> I do pay attention that I'm not using too much [self-management] vocabulary. But there are a few terms I'm not ready to break away from. So I use 'roles' very very often, but before I say 'purpose' [using the English word], I might rather say 'Sinn und Zweck' [i.e. the German equivalent]. (Charlotte, Dec. 2020)

Similarly, team members also sometimes selectively adopted paraphrases used by others to describe their SMOs as a means of downplaying language boundaries. For instance, when they first presented the HoD with their proposal for SMO lead roles in order to pre-empt the hierarchical imposition of a line manager, the team accepted the terms used by the HoD to describe these proposed roles instead of their own terms. As Marc explained, the team initially proposed the terms "Lead Link" to describe "one of the roles which is very much internally oriented" and "Rep Link" to describe the other role "which is very much focused on relationships with outside stakeholders". The HoD had responded to this proposal by remarking "So it's like Home Secretary and Foreign Secretary!" and these terms "stuck" according to Marc "because they're so catchy, whereas Rep Link and Lead Link just don't mean anything to most people – that's just the way it is." This careful moderation of self-management vocabulary, or what Marc called "translational work", appears to have helped the team members selectively blend in their distinctive mode of organizing by conforming to the linguistic expectations of the environment. That such adaptation came at a cost, however, was evident in Charlotte's remark that "I'm constantly busy, at least in my head [laughs] – constantly busy with performing this translation work" (Dec. 2020). Over time, the team seemed to opt for using less and less SMO vocabulary when conversing with others in the surrounding environment. This was noticed by Martin, the neighboring team's manager, who remarked that "there are some elements or catchphrases that you just hear less frequently now".

Camouflaging structural differences. In addition to such self-monitoring, the team members went to even greater lengths to downplay the boundary between their work modes and those of their organizational environment by camouflaging structural

differences between the SMOs and the surrounding hierarchy. Such camouflaging became apparent in instances when the team's mode of organizing was under pressure and when careful language moderation proved insufficient to counter this pressure. As Martin observed: "There is of course, time and time again, the tendency of other departments to ask 'Well how is it possible that they work in a self-managing way? You need someone in charge after all!'." For while responsibilities were in fact clearly assigned within the SMO team, outsiders frequently expressed such confusion with the team's initially highly decentralized role structure, especially with regard to how different roles were responsible for different topics – also to the outside. The team also came under pressure from the HoD himself, who regarded the team and its many topic-related role responsibilities as "high maintenance". In response, the team presented the HoD with an SMO lead role concept that helped the team appear more hierarchical and centralized to the outside while largely preserving the autonomy of its SMOs within:

> Actually, from the moment we presented the role concept and shortly after also communicated the result of the election, from then on [the HoD] no longer really addressed the topic. If anything, he only addressed the subject of disciplinary leadership. As for how people cooperate within the team, he never specifically asked about that. (Charlotte, voice message, Feb. 2021)

This camouflaging tactic proved at least initially successful, since the HoD remarked that the team "did become a bit better organized as a consequence" of installing the shared SMO lead roles. Within months of this change, however, the SMO lead roles again came under scrutiny and their legitimacy was challenged within in the wider organization. This was partly because other stakeholders still claimed to find the team's role structure confusing, both in general and especially regarding its shared SMO lead roles. According to Martin, the SMO lead roles also lacked legitimacy because the shared authority facilitated by the team's SMO roles was not fully compatible with the company's infrastructure and legal framework:

> You always need valid signatures for forms, and sometimes also for digital processes, for example when approving holidays. That's a legal requirement… by, er, the lawmaker, who says employers need to approve. And in practice that means a manager needs to approve. And that can only be one person in the [HR system].

To cope with these challenges, the team members began considering a move which, in the way Marc described it, could be labeled as "conscious decoupling" from their SMOs:

> The two [SMO] roles are thus far lacking external legitimacy. And that's why there'll be a governance process and possibly at the same time a traditional staffing process

in order to be compatible with the organization, while at the same time describing the roles in the [self-management] sense. (Marc, May 2021)

Again this is an example of how the team tried to downplay the boundary between their modes of organizing within the firm by assigning one of the elected SMO roles the official line manager function of the HR management system. This served to make the team appear more "normal" while internal SMO practices were preserved by simultaneously nurturing the SMO roles in the team's governance routines. From Peter's later account, this tactic seems to have had the desired effect of increasing the team's legitimacy: "So, I think they found a pretty good solution. And well, that's probably what cleared up some questions for outsiders."

Although these extreme blending in moves were initially undertaken as a means of externally positioning the team vis-à-vis its surrounding organization, over time they also started to affect the team's internal SMO structures. Indeed, some team members already expressed wariness about the introduction of the SMO lead roles as potentially centralizing too much authority for no good reason. For example, Charlotte cited a colleague who "said we don't need such a role and finds it utterly unnecessary". Later, after the SMO lead roles had been incorporated within the firm's HR management system as a camouflaging move to protect the team's core SMO processes, Alice reflected on this move's ambiguity as follows:

So now it will be hierarchically enshrined … But then it also becomes manifest, you know. You cannot change it as easily … Not that I would want that, but it's just less flexible. I'd still see it as a success for SMOs, though, since at the same time we had to do a lot of persuading.

Discussion and conclusion

Model development

From our empirical study, we identified three main communicative sets of practices of boundary work in the form of (1) *day-to-day nurturing* and two forms of *strategic intra-organizational positioning*: (2a) *exposing* and (2b) *blending in*. Interpreting these findings from a constitutive paradox perspective of boundary work, we developed a process model to capture how the team's continuous combination of these three practices enabled it to uphold its work mode despite the inherent contradictions of pursuing self-management within an otherwise hierarchical organization. Our process model of how these communicative practices and their sub-practices unfolded and interrelated over time is illustrated in Figure 2.

Figure 2. Process model of constitutive boundary work to sustain embedded SMO
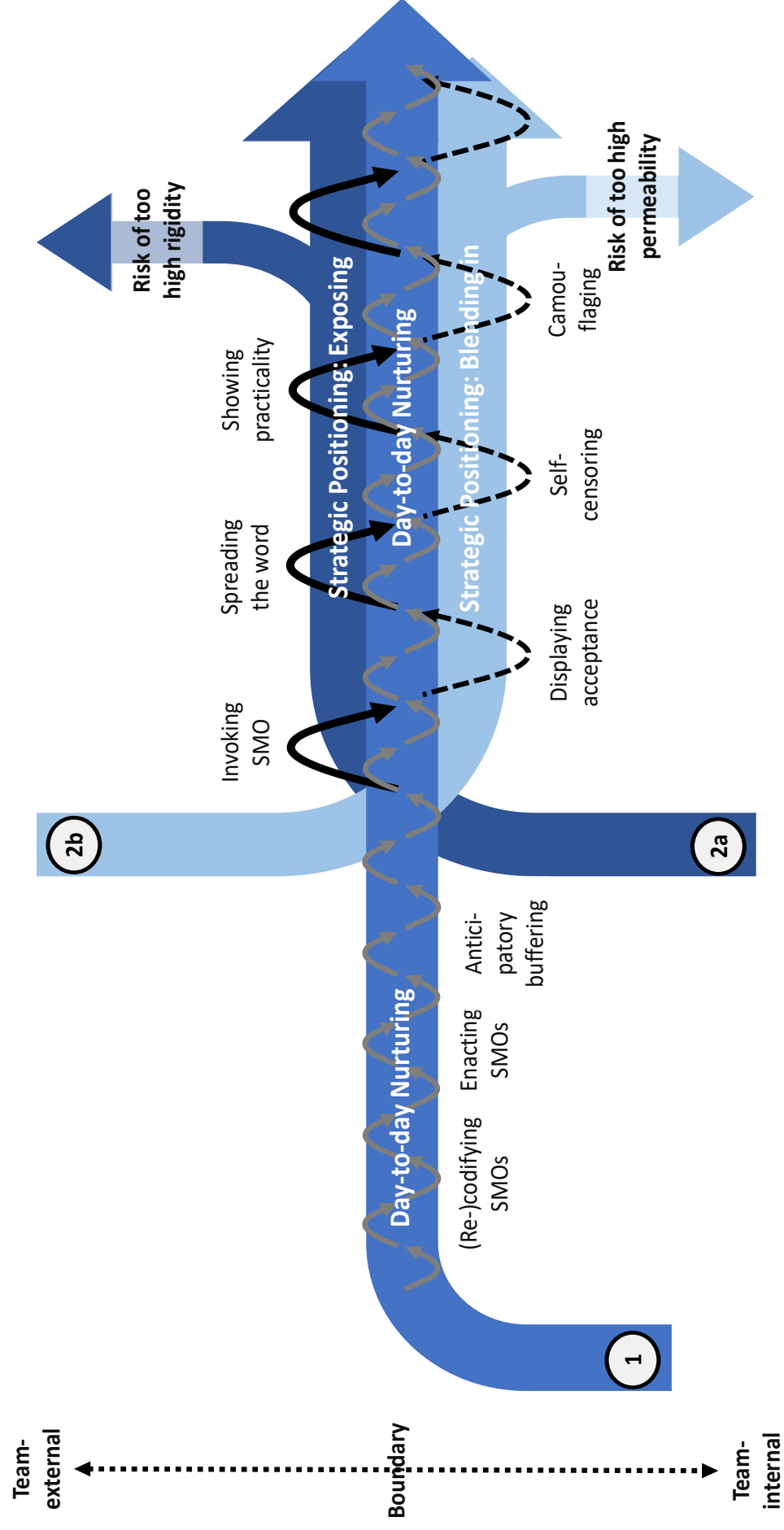
As depicted on the left-hand side of this diagram, the team initially engaged mainly in *day-to-day nurturing* aimed at establishing the (symbolic) boundary between its SMOs and the hierarchical modes of work prevailing in the wider organization. This form of boundary work served both to constitute the intra-organizational boundary in the first place and to sustain it thereafter through continuous and recursive nurturing practices, as represented in our diagram by the light gray arrows zigzagging along the arrow labeled "1". Such nurturing comprised three sub-practices which differed primarily in their temporal orientation, with *(re-)codifying SMOs* typically related to improving past textual manifestations of SMO rules and procedures, *enacting SMOs* related to practices in the here and now, and *anticipatory buffering* related to potential threats to the team's SMOs in an (imagined) future. To capture how these sub-practices were driven from inside rather than outside the team, they are grouped in the lower half of the diagram along with other primarily "team-internal" practices.

While the team's day-to-day efforts to nurture its SMOs were recursively performed and closely intertwined over time, we depict these three sub-practices in Figure 2 as if they had occurred separately one after another not only for simplicity's sake. In particular, *anticipatory buffering* is placed toward the center to reflect our finding that this sub-practice catalyzed new types of intra-organizational *positioning practices* to protect its SMOs. This finding is based on our empirical observation that the team's resolve to pre-empt potential challenges to its boundary led it to alternate thereafter between (2a) practices aimed at *exposing* its SMOs more explicitly to the rest of the organization and (2b) practices aimed at *blending in* with the organization. From this evidence, we infer that anticipatory buffering expanded the team's range of boundary work practices beyond day-to-day nurturing efforts to practices of *positioning*.

In our process model, these practices of intra-organizational positioning are indicated by the broad arrows labeled "2a" and "2b" in lighter and darker shades of blue, while the team's back-and-forth alternation between sub-practices of *blending in* and *exposing* is indicated by the bold black line zigzagging across all three blue arrows on the right-hand side of the diagram. To capture how the team's exposing practices were aimed at more explicitly demarcating the boundary between its SMOs and the rest of the organization, this line is depicted as a continuous bold arrow whenever it rises to the upper half of the diagram, indicating these sub-practices as primarily "team-external", i.e. oriented towards the overarching organization. By contrast, the team's practices of *blending in* are depicted as dashed arrows on this line whenever it drops into the lower

half of the diagram, reflecting how these practices involved downplaying or loosening the boundary of the team's SMOs to render its modes of work less conspicuously at odds with the more hierarchical modes prevailing in its intra-organizational environment. The right-hand side of Figure 2 thus visualizes the co-occurrence and interplay of the team's three main practices of boundary work as the team oscillated over time between efforts aimed either at blending in or exposing its SMOs in parallel with continuous practices of day-to-day constitutive nurturing. Beyond confirming that the team's positioning practices predictably intensified when its SMOs were faced with new challenges or perceived as being under threat, our empirical data also evidence a paradox whereby engaging too intensely in either one of these practices endangered the intra-organizational boundary what, in turn, required counterbalancing with the other. Over time, a continuous interplay ensued between the team's back-and-forth attempts to strengthen its boundary by fixing the meaning of its SMOs vis-à-vis the organization and attempts to weaken this boundary by rendering its SMOs more permeable and loosely defined. Again, although Figure 2 depicts this interplay as proceeding in a somewhat linear succession, in organizational reality the different practices did not seem to occur necessarily in this temporal order but could also be combined in different ways depending on the needs of the situation.

In developing our process model, we found it especially helpful to draw on theoretical considerations grounded in a constitutive paradox view of boundary work (as introduced further above). This perspective enables us to theorize why the team needed to engage in the continuous recursive combination of all three forms of constitutive practices to harness the joint capacity of these practices for sustaining the boundary of its SMOs. In short, we found that combining and (counter-)balancing all three main practices was crucial because relying on any one of them alone would have been insufficient to uphold the SMOs in the face of inevitable pressures from outside the team. For example, day-to-day nurturing practices by themselves would not have enabled the team to resist the pressure to redefine its SMOs following the appointment of a new HoD. Nor would it have been sufficient to rely on combining the two types of positioning practices without day-to-day nurturing to protect the team's SMOs, since this may have resulted in demotivating the employees and alienating them from the principles of self-management by sending the message that all their efforts to uphold their SMOs were merely a façade. Had the team combined day-to-day nurturing with exposing practices only, this would likely have resulted in an overly strong boundary,

thereby increasing the likelihood that the embedded SMOs would be rejected by the surrounding organization. For example, our findings suggest such rejection would have occurred if the protagonists had insisted on sticking to a leaderless team even though the firm's HR management software required at least some degree of higher responsibility to be allocated to certain team members. Conversely, if day-to-day nurturing had been combined solely with blending-in efforts, the symbolic boundary would likely have become so weakened as to render the embedded SMOs indistinguishable from the organizational environment.

Taken together, we conclude that it was precisely the *dialectical interplay* of all three constitutive practices that proved key to the team's success in sustaining the precarious boundary of its SMOs, thus far. This interpretation is grounded in our observation that the inherent challenges of pursuing self-management within a hierarchical organization required the embedded SMOs to oscillate continuously between the apparently contradictory practices of blending in and exposing in order to navigate two main risks associated with such a paradoxical setup, i.e. either the risk of *too high rigidity* (symbolized in Figure 2 by the upward-pointing arrow) or *too high permeability* of the boundary (symbolized by the downward-pointing arrow). First, our empirical data give grounds for inferring that a too rigid boundary is likely to arise if the team would have over-exposed its SMOs and thus created the impression of a too-clear-cut distinction between its particular work mode and the work mode of the surrounding, hierarchically operating organization. In consequence, the team's legitimacy, as granted by the overarching organization, is likely to erode. Second, in turn, a too permeable boundary could occur if the team would have engaged too intensely in practices of blending in, and thus would have risked becoming indistinguishable from the hierarchical organization which it is embedded in. Such indistinguishability, in turn, would make it difficult to uphold the team's commitment to SMO principles.

Theoretical contributions

Our study makes two main contributions. First, we contribute to the literature on embedded SMOs (e.g., Barker, 1993; Diefenbach and Sillince, 2011). Extant research on SMOs in general has emphasized the importance of principles and processes to perpetuate shared authority and control characteristic of SMOs, including a strong shared commitment to self-management principles among members of teams practicing such modes of organizing (Diefenbach, 2019; Islam and Sferrazzo, 2021; Jaumier, 2017;

Soetens and Huybrechts, 2023). Our study confirms these findings and highlights the importance of nurturing such principles and processes over time. Because extant works in this area have mostly focused on stand-alone rather than embedded SMOs (for an overview, see Lee and Edmondson, 2017), however, little research has yet been undertaken into how SMO teams relate to other teams or to the overarching hierarchy in intra-organizational contexts. Moreover, the few studies that do consider how SMOs relate to other modes of organizing have come to somewhat contradictory conclusions. On the one hand, it is proposed that greater independence from an overarching organization makes it easier to maintain embedded SMOs insofar as compatibility issues can be avoided (Martela, 2019); yet, on the other hand, it is widely agreed that managing reciprocal relationships is vital for getting work done (Gittell and Douglass, 2012). In demonstrating how the team's success in navigating these issues relied on careful evaluation and ongoing negotiation of its position vis-à-vis its wider organizational environment, our study shows how engaging in deliberate intra-organizational boundary work can help sustain SMOs over time by ensuring they remain sufficiently compatible with their surrounding institutional environment.

With these findings, our study further sheds light on a paradoxical problem commonly encountered by (embedded) SMOs that has long been documented in the literature. In an early study on the emergence of peer control in self-managing teams, for example, Barker (1993: 435) identified this problem as "an ironic paradox that occurs" when a strong commitment to organizing work without formal hierarchical controls leads to even stronger forms of peer control being imposed through strict adherence to the rules of self-management (see also Diefenbach and Sillince, 2011, and to some extent Soetens and Huybrechts, 2023). In the absence of a shared commitment to such self-management principles and rules (see Turco, 2016), however, institutionalized forms of hierarchy can easily resurface in SMOs, thereby often provoking skepticism and resistance among employees (van Baarle et al., 2021). Our analysis contributes in this context by providing a systematic and empirically grounded account of how the case team navigated this double challenge faced by embedded SMO teams of becoming either absorbed by their organizational environment or too absorbed by their own SMOs to remain compatible with their environment. In particular, we show how the team overcame issues similar to those described by Barker (1993) and others (e.g., Diefenbach and Sillince, 2011) by combining different practices of boundary work, including alternating and counterbalancing practices of intra-organizational positioning.

Second, we add to research on organizational boundary work (Langley et al., 2019), and especially to the subset of literatures that has explored the paradoxical character of boundary work (e.g., Azambuja and Islam, 2019; Comeau-Vallée and Langley, 2020; Farchi et al., 2023; Glimmerveen et al., 2020). While this research has generated important insights into the unforeseen and paradoxical *effects* of boundary work, these insights have been mainly developed in the context of the relatively stable and institutionalized boundaries between professions or job roles. We build and expand upon these insights in the context of symbolic boundaries between different modes of organizing. Such more precarious boundaries between different domains of meaning, require recurrent negotiation and reinstantiation. In this context, we further contribute to advancing theorizations of the constitutive role of paradoxical boundary work (see also Azambuja et al., 2023 for a more constitutive understanding of boundary work). We do so by connecting extant literatures on boundary work (Azambuja and Islam, 2019; Comeau-Vallée and Langley, 2020; Glimmerveen et al., 2020) with other works that have put forth a constitutive paradox view in organization studies more generally (Fairhurst and Putnam, forthcoming; Putnam et al., 2016; Vásquez et al., 2016). Taking a communicative constitutive perspective, we highlight that paradoxes are not merely a side-effect of boundary work but rather that it is the ongoing communicative negotiation of such paradoxes that creates and maintains these very boundaries.

Our findings suggest the linkage between constitutive paradox views and boundary work merits application in future research as a promising approach for exploring not only how embedded SMOs can be sustained within hierarchical organizations but also to analyze the perpetuation (or collapse) of similarly paradoxical organizational phenomena when different modes of organizing are supposed to coexist. Our study's findings lead us to the more optimistic conclusion that such modes of work can indeed be sustained if appropriate practices are combined to navigate the well-known risks of their paradoxical setup. We further hope that our process model can help enrich extant research on SMOs by providing researchers with a new theoretical vocabulary to describe and address the precarious character of SMOs.

Limitations and outlook

Our study has two main limitations, both of which indicate promising avenues for future research. First, we were unable to conduct the data collection fully on-site because the majority of our data-collection period coincided with restrictions related to the Covid-19

pandemic. Accordingly, we decided to follow the case team remotely over a longer period and to complement our other forms of data collection by conducting sequential interviews. We found this approach of "remote shadowing" a fruitful addition to the methodological toolkit of organizational scholarship, especially for exploring how actors navigate and reflect on complex situations. Second, we deliberately selected a case setting in which the SMOs were embedded in a traditional hierarchical setting. Whether the same kinds of practices would also be identified in the case of a self-managing team embedded in a more progressive organizational context is an empirical question that merits further investigation. On a final note, we also hope our findings will be of use to practitioner audiences, especially those who – like the protagonists in our study – have undertaken the admirable but effortful endeavor of organizing their work in a largely flexible and autonomous manner while seeking ways to comply at least to a sustainable degree with the institutionalized hierarchical order of the organizations in which they are embedded.

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Appendix 1. Chronological overview of events

Developments within the team

Mid 2017 - mid 2018
Experimentation and development of SMOs in team

Sept. 2018
Team proposes several SMO topic lead roles instead of interim team lead

Nov. 2018
Establishing and stabilizing SMO topic lead roles

Late 2018 - May 2020
Continuation and refinement of SMOs in team

Sept. 2020
To preempt managerial decision on hierarchical team lead, the team proposes shared SMO lead role

Oct. 2020
Team agrees with HoD on test phase of elected shared SMO lead roles instead of hierarchical team lead

Nov. 2020
Team elects two of its members into SMO lead roles

May – June 2021
Team proposes to add SMO roles to official org. chart to prevent reinstalment of hierarchical team lead

Developments outside the team

Feb. 2017
Start of SMO experiment in dept.

June 2018
Team lead to go on parental leave; SMOs' future in team unclear

May 2020
New HoD – SMOs' future in team unclear

June - Oct. 2020
HoD's wish to reinstall team lead grows stronger

Early 2021
Launch of a global competence center calls team's SMO work mode in question

May 2021
Legitimacy of SMO lead roles still in doubt, as HoD questions if roles are sustainable solution

July 2021
SMO lead roles are added to official org. chart to increase visibility/legitimacy

ongoing SMO work

developments outside the team

developments within the team

developments are linked to each other

Background data (not cited in analysis)

Period of conducting sequential and contextual interviews

Archival data

2017 — 2018 — 2019 — 2020 — 2021

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Appendix 2. Data table

Aggregate dimension	2nd order themes	Illustrative quotes
(1) Day-to-day constitutive nurturing	(Re-)codifying SMO terms	What I learned about SMOs during this whole time is the roles-based order. And what it means to occupy a role… that it isn't the same as a fixed position. (Martin)
		So we asked everyone in the team: 'What do you need with regard to [this topic] for it to work for you?' And then everyone put their wishes on a whiteboard and we kind of wrote down our rules in a proposal. And then we adopted it. (Alice)
		We always have the possibility to, well, to adapt our structures in a governance process – well, erm – depending also on what we need in the future. (Marc, May 2021)
	Enacting SMOs	Self-organization is mainly characterized by the fact that there is a facilitation role and everyone is given as much speaking time as they need. (Charlotte, Feb. 2021)
		Well, when you're practicing self-management, you are relying on people's motivation … And you need people to raise their hand. To take on open tasks. That's critical, because if the motivation is gone [laughs], then you don't have any resources to get results. (Marc, Jan. 2020)
		…that our meetings are, well, effective and goal oriented but that they're motivating and not boring, too. Through the check-ins or other motivating aspects. (Daniel)
	Anticipatory buffering	There was this tentative wish by [the HoD] that there should be a line manager between him and the team. Erm yes, and then we developed proposals for different scenarios … and committed to focusing on one of them in particular. (Alice)
		So, I think there is an opportunity right now for me to regularly address this department-wide at the structural level. And to say that, well, if we're building a new organizational structure, then we should also talk about how people want to work together in such a new structure. (Charlotte, Jan. 2021)
		There are these plans for a new future department structure, right? And that will of course also have a big impact on the team. So, we also developed a structural proposal for how we want to deal with that in the future. (Marc, Feb. 2021)

Appendix 2. (Continued)

Aggregate dimension	2nd order themes	Illustrative quotes
(2a) Constitutive positioning: Exposing	Invoking SMOs in front of others	We are still a bit of a gallic village and claim our autonomy [laughs] … based on the terms that we discussed in the team. (Charlotte, July 2021)
		I think, because of the SMOs, we are more emancipated, we all have our topic areas and represent them directly [to the HoD]. … And nobody in Martin's team would do that [laughs]. (Marie)
		So, we think about it and then we bring up issues directly with the HoD, without a line manager to consult first. (Daniel)
	Spreading the word about SMOs	A lot of our culture will be incorporated in that project [about the global organizational structure]. How to design roles … et cetera. I think that, at least at the moment, increases the sphere of influence of SMO. (Alice)
		I now have a degree of exposure through the SMO lead role to other parts of the department… and my impression is that this could be a way to have more impact. To, together with the team, take the next step and develop the SMOs further. (Charlotte, Dec. 2020)
	Demonstrating practicality of SMOs	And I did hear things like: 'If they want to work in a self-managing way, then they need to show results' and so on. That we are as fast or even faster in delivering solutions. And at the end of the day, it's working. (Marc, Oct. 2020)
		We had to gain the HoD's trust that what we do actually works. And it does work well. And we perform well, I think. (Alice)
		So, some say, like, 'feel-good organizing also needs to perform!' To which I would say, that is factually true, but it's not like SMOs are about feeling good all the time.… (Martin)

Appendix 2. (Continued)

Aggregate dimension	2nd order themes	Illustrative quotes
(2b) Constitutive positioning: Blending in	Displaying acceptance of other modes of organizing	To be compatible… that is a super important topic. Also, to be able to show that we understand how things work in other parts of the organization. (Marc, Nov. 2020)
		I told [a colleague in another department] about our SMO roles and what that means for us, how it manifests itself. And then we considered together what such a role logic would mean for her department. And then we found that, maybe, it wouldn't be the best fit in that context… and I think it's important to also show that. (Daniel)
		We work in a very self-managing way, and we have developed a lot of knowledge and skills in that context And sometimes we overwhelm people when we talk about roles-based work and so on. So… we need to be mindful of that. (Charlotte, Oct. 2020)
	Self-censoring SMO vocabulary	And maybe [the HoD] doesn't know what we mean when we use our labels for the two SMO lead roles, but home and foreign secretary is familiar to him, because he came up with it and then I consciously repeat them in moments where it's important to me that he knows exactly what I am talking about. (Charlotte, March 2021)
		Sometimes it's difficult because you do realize over time that you use this vocabulary quite naturally. Like 'governance' and stuff. And then people are like 'what'? So yeah, to notice how taken for granted this vocabulary has become. And how we deal with that in other contexts. (Daniel)
		I don't even use the word self-management anymore. I just call it something else … because there are people who would explicitly say: 'I don't need SMOs.' But they do want some of the processes that we use or how we design roles. They get really hooked on that. (Alice)
	Camouflaging structural differences	In pure company logic, Marc is in charge. That's the company logic… and that's also what the HR management system says, Marc is the line manager, even though they handle it differently in the team. (Martin)
		What we were missing in the SMO lead roles was legitimacy. And the only way to get this outer legitimacy was to go through a classical recruiting process for the roles. And… the team were like 'can't we vote? Isn't there another way to fill the roles?', and that's where we currently stand in the governance process. (Marc, April 2021)
		Then we discussed different scenarios and proposals to avoid [getting a line manager] and we said 'this is what the team wants and it means that Charlotte has one role and Marc has the other', and to translate that into the [HR management system], into hierarchy, so to speak, that felt like gaining legitimacy for our SMOs [laughs]. (Alice)

Paper 2.

From fleeting enchantment to embodied commitment:

How bottom-up momentum can emerge and persist

Anna Stöber

Accounts of momentum in organization studies suggest that the success and sustainability of change efforts depend on the extent to which such efforts gain the commitment of actors to pursuing a new path. Whereas earlier scholarship conceptualized momentum as facilitating a linear path towards a predefined goal, more recent research has revealed that the emergence and attainment of sustainable momentum involves a more dynamic and complex process of social interactions and communication patterns. However, even these dynamic conceptualizations have focused mainly on empirically mapping momentum in the context and from the perspective of planned change driven from the top down. In this paper, by contrast, I mobilize a communicative constitutive view of organization to elaborate a concept of momentum driven from the bottom up and perpetuated beyond strategic intervention. Grounded in a qualitative study in the context of a German medical technology company, I show how new modes of organizing introduced by the case firm's management initially induced short-term momentum that subsequently plateaued and gave way to ambiguity and critical evaluation concerning the initiative. Momentum only recurred as certain actors started attaching their own meanings to the idea and, more importantly, began developing an embodied sense of commitment to these new modes of organizing. My analysis contributes to the theorization of momentum in organization studies by highlighting the role of embodied commitment in perpetuating momentum, especially from the bottom up. My study thus emphasizes the role of new meanings emerging from individual interpretations that can shift momentum away from an intended path.

Introduction

For any new idea or process to take root in an organization a degree of momentum needs to be developed and maintained not only for the idea to emerge in the first place but also to persist over time. The notion of momentum to describe a collective sense of flow or directionality is intuitively familiar in colloquial usage, as in common descriptions of sports teams being "on a roll" or of politics and markets following a certain direction over time. Often associated with changes or developments considered to be progressive, such change-based momentum can also stagnate or take an unexpected turn, as when a team's winning streak comes to a sudden end or – to cite more consequential contemporary instances – when the rollout of renewables tapers off or when the advancement of LGBTQ+ rights comes up against the momentum of conservative pushback.

As a concept emerging from the domain of physics, "momentum" originally referred to the "strength or force gained by motion or by a series of events" (Merriam-Webster Dictionary). Like many metaphors from the domain of physics, the notion eventually found its way into organization and management studies mainly as a concept applied to organization-wide strategy (see Morgan, 1986). Confusingly enough, whereas organizational scholars initially applied this concept primarily in the context of structural inertia to study how commitment towards a certain path can persist or fail to persist over time (Kelly and Amburgey, 1991; Miller and Friesen, 1980), the notion of momentum in organizing has more recently been mobilized in the context of developing new paths by scholars seeking to explain organizational change (Jansen, 1999, 2004). These scholars have argued that change-based momentum is needed to overcome the countervailing force of stasis-based momentum (Jansen, 2004), i.e. the momentum hitherto accumulated in the direction of existing paths. Such research in contexts of change-based momentum has predominantly emphasized the role of managers and opinion leaders in fostering momentum from the top (Dutton and Duncan, 1987). As an important exception to this tendency, Karen Jansen (2004) has hinted at the possibility of momentum being built bottom up from other parts of the organization once a critical mass of support for an idea has been attained and/or when actions are undertaken towards a specific goal in the absence of managerial involvement (see also Wiebe et al., 2012).

Even when focused on contexts where momentum is a more emergent and bottom-up phenomenon in organizations, however, the literature to date has left several

avenues unexplored for further developing the concept. As mentioned, this is mainly because existing empirical studies focus predominantly on how momentum is built from the top (Dutton and Duncan, 1987; Jansen, 2004), though also because extant studies tend to concentrate on the pursuit of consciously intended and strategic forms of change and innovation to investigate how the intensity of momentum directed towards such pursuit can be mapped and ultimately managed (Jansen and Hofmann, 2011; Schubert et al., 2013; Turner et al., 2013). While some research has acknowledged that momentum can also be built from the bottom up and develop beyond strategic intervention, such work has either been purely conceptual in nature or only mentioned momentum as an empirical term (Granqvist and Gustafsson, 2016; Jansen, 2004; Kremser and Sydow, 2022).

Given that so many aspects of momentum remain underexplored despite the ubiquity of the notion in our linguistic usage within organizing and beyond, it seems worthwhile developing the concept of momentum in organizing further. In taking up this endeavor, I make two contributions. First, while acknowledging the importance of top-down influences in building initial momentum, my case study contributes an empirical account that captures the bottom-up development of momentum and the interplay between bottom-up and top-down dynamics. Second, whereas most prior research has treated the relevance of momentum as being limited mainly to its influence in driving strategic change, I seek to understand momentum as a dynamic impetus that can imbue all aspects of organizational life with vitality and even shape the evolution of an organization over time. My paper thus sets out to investigate the following research question: *How can momentum emerge bottom up and how does such momentum unfold beyond strategic intervention over time?*

To address this question, I draw on a communicative constitutive understanding of momentum that views this phenomenon, along with organization and organizing itself, as developed through micro-interactions from the bottom up (Putnam et al., 2016; Taylor, 2009). A communicative constitutive perspective provides an explanatory lens that helps understand how momentum can build from all levels of an organization as a phenomenon constituted by and situated in communicative events that animate people towards a certain trajectory. Such insight is possible from this perspective because a communicative constitutive understanding tends to reject the separation between micro- and macro-level and between change and stability in favor of bottom-up thinking that comprehends organization, including stability and change, as realized through the

negotiation and reproduction of meanings over time (Taylor and Van Every, 1999). From this perspective, organizational life is developed in a continuous process of meaning negotiation whereby features of organizational life emerge as actors interact with and reproduce new meanings (Ashcraft et al., 2009). This perspective is also useful for helping gain an understanding of how any initiative or idea can take on a trajectory of its own once it enters an organization and develops its own momentum (Vásquez et al., 2016).

Below I present my findings from an in-depth qualitative study of how momentum emerged and dynamically unfolded in the context of the implementation of novel and decentralized modes of organizing within a multinational medical technology company. Initially introduced only as an experiment by management in two pilot departments, the new modes of organizing[1] referred to as "TeamLoop" subsequently diffused to other parts of the organization as their promise of more decentralized decision-making and task allocation ignited people's interest and engagement and thus led the practices to spread. My findings reveal how the new modes of organizing developed three different types and phases of momentum over time: Enchantment, Ambiguity and Embodiment.

The first of these types of momentum emerged from an initial enchanting "buzz" that was generated about and raised people's awareness of TeamLoop. This momentum proved to be fleeting, however, and plateaued as people moved on or only superficially engaged with the new modes of organizing. A second phase then followed in the form of ambiguity as people began to question these modes of organizing and develop a more critical stance towards TeamLoop, causing momentum to plateau and even appearing to be at risk of dwindling away. From this phase of ambiguity, however, a third and more sustainable type of momentum developed as certain actors came to ascribe their own understandings and meanings to TeamLoop, with some growing so attached to the idea that they subsequently perpetuated it according to their own (transformed) understanding of TeamLoop as opposed to the interpretation originally propagated by management. Strikingly, my data show that this more lasting type of momentum ensued from and was mediated by a sense of *embodiment*, with a number of interviewees describing how ideas related to TeamLoop had become an integral part of their being and sense of themselves at work.

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[1] I use the term "new" or "novel" modes of organizing here to refer to modes that were new to my case organization rather than necessarily to the first-time innovation of a certain practice in general.

Whereas previous studies have mainly focused on mapping the intensity of momentum that has been developed (often in the short term) and on ascertaining how such momentum can be managed top-down (Dutton and Duncan, 1987; Jansen, 2004; Jansen and Hofmann, 2011), my study makes several novel contributions to our understanding. First, it empirically demonstrates how momentum can (re)emerge and be sustained from the bottom up without the need for constant managerial intervention, especially in the case of momentum facilitated by *embodied commitment* to an idea. For while the two phases of Enchantment and Ambiguity identified in my analysis certainly laid the ground for the third phase of Embodiment by building awareness and understanding, my account evidences and elucidates how momentum for TeamLoop was only able to be perpetuated over time through an embodied sense of experience. Second, my analysis highlights how the emergence of new meanings can generate momentum independently of and beyond any initial top-down messaging. Third, my study emphasizes the more general relevance of the concept of momentum as an organizational influence beyond the scope of organizational change.

Literature review: Emergent momentum

As previously indicated, definitions of momentum in the literature are somewhat confusing (Wiebe et al., 2012). Many works, especially earlier studies, have conceptualized momentum as a linear vector tending towards upholding established structures, i.e. as an inertial "energy" (Amburgey et al., 1993; Miller and Friesen, 1980) that can only veer in a new direction if a mismatch between organization and environment induces a crisis (Gersick, 1991). In contrast, another stream of works in this literature conceptualize momentum as a dynamic force that can drive both minor incremental change and major radical change, potentially even simultaneously (Dutton and Duncan, 1987; Jansen, 2004). This type of momentum has been termed "emergent momentum" by Wiebe et al. (2012). As Jansen (2004) has pointed out in the context of top-down strategic change, this kind of momentum can emerge when an announcement about change subsequently creates a "buzz" in conversations and meaning-making processes among individuals that can ultimately lead to progress towards change and in turn fuel further momentum. Meanwhile, Dutton and Duncan (1987: 286) have argued that the intensity of such momentum for change depends on "the level of effort and commitment that top-level decision-makers are willing to devote to action". Once the

desired changes have been achieved and stabilized, it is argued, a "deceleration" of momentum sets in (Beck et al., 2008).

Although the core literature on momentum mainly focuses on applying this concept in the context of top-down and strategic change (see also Jansen and Hofmann, 2011; Schubert et al., 2013; Turner et al., 2013), some research has also shown that momentum can be built in a more bottom-up fashion. For example, while also empirically focusing on strategic top-down influences, Jansen (2004) has mapped out two contrasting ways in which momentum can emerge from the bottom up. In one possible scenario, she argues, support for alternative practices can accumulate by 'contagion', either through the influence of opinion leaders or by gaining the support of a critical threshold of relevant actors, with both processes relying heavily on social interaction. In another possible scenario, Jansen (2004) argues that bottom-up momentum can emerge through repeated actions that accumulate towards a certain trajectory. Valuable insights into the more unplanned and bottom-up dynamics of momentum have also been yielded by adjacent research not concerned with momentum as a theoretical concept per se. For example, research on self-reinforcing dynamics in organizing has shown how practices can develop "an emergent and escalating functional or dysfunctional momentum" (Kremser and Sydow, 2022: 3), meaning unintended practices can potentially gain a momentum that may be difficult for managers to control, whilst research on temporality in institutional work has emphasized how "actors draw on and reproduce momentum" depending on their subjective experience of time, including their sense of urgency (Granqvist and Gustafsson, 2016: 1013).

I define bottom-up momentum as the level of effort and commitment devoted to a certain issue that accumulates through social interactions. This definition aligns with prior scholarship in implicitly emphasizing the importance of communication and interactions in building momentum from the bottom up. To date, however, the particular mechanisms that build such momentum have not been further specified in the existing literature. The value of the concept of momentum has thus far been overlooked in terms of its potential for organization studies as a generative dynamic that is relevant not only in contexts of strategic change but animates organizational life at large. Indeed, the few studies that have approached momentum from a more bottom-up perspective suggest that the notion lends itself to tracing how any new mode of organizing can emerge and gain traction in an organization from the bottom up. These accounts indicate that momentum can help explain how ideas brought into an organization from the top can

be "hijacked" and shifted in possibly unintended directions, with the wider implication that a degree of momentum needs to be developed and maintained in order for any concept or process to take root in an organization. While indicating that momentum is a dynamic relevant to organizational life in general, however, these accounts have remained almost exclusively at an abstract and conceptual level.

Taking up calls from scholars for a closer empirical examination of the various social and communication processes involved in developing and sustaining momentum (Jansen, 2004), my own approach builds on Wiebe et al. (2012) in stressing the importance of communication and language for "emergent momentum". For this purpose I combine extant works on momentum with theorizing on the constitutive role of communication in organizing to trace how novelty in organizations can emerge through conversations held among actors at any or all levels of an organization. A communicative constitutive view is particularly suited to my research purpose because it offers an inherently bottom-up understanding of what constitutes organization, holding that organization itself emerges and is developed through continuous micro-interactions (Taylor, 2009; Taylor and Van Every, 1999). This understanding matches the emphasis placed in previous research on the importance of communication for building momentum in the form of commitment to new or existing paths, especially through strategic management communications but also in and through everyday communicational and interaction patterns at work. As I elaborate below, a constitutive approach complements this understanding by providing a theoretical view and vocabulary for investigating how momentum builds in and through communication, including how it can evolve and be sustained beyond its strategic application.

A new theoretical lens: Momentum as constituted in communication

In adopting a communicative constitutive lens as a theoretical perspective for tracing how momentum is built bottom-up in (micro-)interactions, I draw on theorizing rooted in speech act theory (Searle, 1969). Such theorizing proposes that organization – and by extension organizational change – occurs not merely *through* communication but *within* communication, meaning communication is understood not only as an essential part of organizing and organizations but as what constitutes, sustains and changes organization (Schoeneborn & Vásquez, 2017). In this view, organizational "realities" such as organizational charts and job titles do not simply exist independently but are constituted in communication and hence to some extent always "up for grabs" even when seemingly

well established (Ashcraft et al., 2009, p. 4). Any organization is thus conceptualized as a self-organizing system of recursive communication that is *described in text* and *realized and experienced in conversations* (Taylor and Van Every, 1999). "Texts" are here understood as relatively stable verbal and non-verbal manifestations of the organization to which actors can refer and that are (re)produced in conversations, with "conversation" understood here as a dynamic co-constructive mode of communication, as summarized in the following quotation from Schoeneborn and Vasquez (2017: 6):

> When described, organization becomes an object toward which organizational actors will co-orient their actions: they tune in to one another as they engage in coordinated activity. When realized, organization is enacted through interaction and is related to processes of meaning negotiation.

Applied to organizational change, this view posits that communication is "the very medium within which change occurs" (Ford and Ford, 1995: 542). This in turn implies that momentum – e.g. for new modes of organizing – can develop in all parts of an organization insofar as such modes manifest themselves as new texts and templates for conversation that are (re)produced in interaction. From this it follows that these same processes can also have the opposite effect in co-constituting inertia and perpetuating routines when existing texts are reproduced (Ashcraft et al., 2009). In sum, a communicative constitutive lens accounts for the same paradoxical dynamics of inertia and change highlighted in prior conceptualizations of momentum reviewed in the previous section.

Applying a communicative constitutive approach, I proceed from the premise that any idea, as in my case the intention to introduce new modes of organizing, will emerge and manifest as a new "text" in parts of an organization after having been negotiated in conversation. These texts can then become the referent for co-orientation as various announcements are made relating to the ideas associated with them. Through such announcements, often combined with presentations and workshops, more actors will become aware of the emerging new text and potentially (re)produce it in conversation (Taylor, 2009). In this way momentum for new modes of organizing can build in and through recurring conversations and co-orientation between organizational actors. Indeed, such momentum is needed both to sustain a new text in one part of an organization and for the text to emerge in other parts of the organization as conversations travel, i.e. as new modes of organizing spread within the organization. Importantly, this constitutive view extends beyond the symbolic level of communication as language by making organizational communication reconcilable with materiality, since

communication is seen as an "embodied process situated in space and time" (Ashcraft et al. 2009: 33). This allows for a reconciliation with the material world by accounting for the role of technology, physical spaces, and especially bodily experiences in the context of new modes of organizing.

As my study demonstrates, such an expanded understanding is particularly relevant for explaining the role of bodily experiences in building momentum. While prior studies have often described momentum as an "energy", they have mainly tended to use this as an empirical term without having developed the theoretical grammar to describe the more abstract influence of such physical energy and bodily experience on momentum. Applying a constitutive lens can help in this regard by linking such influence to the role of communicative influences in building momentum. In part this is because a communicative constitutive view affords an explanation of how communication, and especially the text-conversation dynamic, can assume an almost physical intensity. This is evident in embodied communicational routines understood as "citational patterns of embodied conversation and textual dialectics" whereby "actors collectively embody communicative processes as conversation and text" (Wright, 2016: 148, see also Wright, 2019). As argued by Kuhn, Cooren and Ashcraft (2017: 59–63), such communicational routines can develop an affective quality beyond language and social interpretation that pushes and pulls our bodies and is experienced as a force that can prompt action and cause transmission beyond interpretation.

Another benefit of adopting a communicative constitutive approach to momentum is that this view extends far beyond any strategic understanding of communication as a phenomenon that can be applied and managed as intended. This is crucial not least because what tends to be overlooked in existing studies of momentum that focus on how communication can be managed to direct and most often to grow momentum towards a desired path is how often communication yields unintended and undesired outcomes, including by building momentum towards undesired paths. If we accept the conclusions of prior research showing that organizational phenomena are "constituted through ongoing processes of opening and closing of meaning" (Vásquez et al., 2016: 631), however, it clearly follows that any efforts to control and order meanings risk simultaneously causing greater disorder.

Empirical context and methods

To address my research question of how momentum can emerge bottom up and unfold over time beyond strategic interventions, I investigate how a German medical technology and pharmaceutical company (pseudonymized here as "MedCo") experimented with less hierarchical modes of organizing and how momentum for this initiative ebbed and flowed over time. These new modes, hereafter referred to collectively as "TeamLoop", were initially introduced in two pilot departments. This case seems well-suited for my research purpose insofar as it is reasonable to expect the tension between inertia and change-based momentum to be especially pronounced in a firm with a history and tradition stretching back over 180 years and with numerous employees around the world operating in a highly regulated environment – all of which aspects can readily be assumed to render it difficult for new modes of organizing to gain momentum beyond hierarchical intervention. Moreover, although momentum for TeamLoop plateaued and even seemed likely to fade away once the management-supported pilot phase had ended, my data show that momentum for these new modes of organizing later re-emerged in ways unanticipated by and contrary to existing accounts of momentum in the literature. As such, this case is thus well suited for yielding new insights into momentum, especially beyond prevailing strategic understandings of the concept.

Research setting

Founded in Germany, MedCo is a manufacturer of medical technology and pharmaceuticals with over 60,000 employees in more than 60 countries at the time of my study (Annual Report 2019). The firm has grown rapidly in the past 40 years, expanding from a German SME employing 3,100 staff in 1976 into a global corporation today. With this expansion came a growing concern to identify the most appropriate forms of collaboration across the organization. Over the years, several initiatives were introduced to enhance communication and cultivate a sense of self-responsibility and self-initiative among employees, including through changes to the IT-infrastructure and the layout of MedCo's offices (Internal report 1998). However, TeamLoop was the first initiative undertaken by the firm to address these concerns through changes to the modes of organizing.

TeamLoop was first launched in February 2017 with a joint kick-off event, following which the two pilot departments went on to separately conduct brief monthly

workshops as a way of iteratively developing and testing decentralized modes of organizing. In contrast to MedCo's traditional line-hierarchy, these new modes of organizing were characterized by collaboration beyond and across functional silos, decentralized communication and decision-making, and a higher degree of transparency and communication within and beyond departments. Based on a vision of decentralized governance inspired by the concept of "holacracy" as developed by Brian Robertson (2015), this approach was supported by several new meeting routines to facilitate communication and the continuous adaptation of roles and responsibilities. Since the organization as a whole still operated along traditional lines, the new governance structures needed to operate in parallel with MedCo's traditional structure to ensure the adopting teams and departments remained compatible with the rest of the organization. Although the firm's CEO was a strong supporter of the initiative, the project was owned and governed by the two pilot departments, namely the Corporate HR and Corporate Communications departments, which at that time acted under the same head (Internal magazine 2018: 13). According to the head of these two departments (interview in Internal magazine 2018: 13), the CEO endorsed the TeamLoop experiment but did not place any pressure on the departments to undertake such experimentation.

During the early piloting period and beyond, the experiences were documented in a blog and some employees received extra training to serve as volunteer facilitators with the capacity to support the pilot departments after the engagement of external coaches for the initial workshops was gradually phased out. While the pilot departments further developed their internal practices with varying degrees of adoption and success in the respective teams, the head of these departments initiated a range of different dissemination activities to share experiences of TeamLoop within the firm. To cater to growing interest from other parts of the organization in learning more about the new practices, the volunteer facilitators offered introductory workshops, and from summer 2018 onwards provided additional support for teams who had decided to work with TeamLoop longer term. Since then, TeamLoop has developed further and spread to other departments through decentralized and non-concerted diffusion.

Data collection

To trace how the new modes of organizing developed at MedCo over time, I conducted 20 in-depth interviews and collected 230 pages of company documents from 2017–2019, including protocols from workshops and department meetings, announcements, posts

on the company's social platform, and reports and presentations about TeamLoop. I opted to use interviews as my main source of data on the basis that momentum, though relational in the way it develops in social interactions, is ultimately a form of intensity subjectively perceived by individuals (Jansen, 2004; Shipp and Jansen, 2021). Interviews enabled me to access evidence of momentum through individuals' perceptions and what they considered relevant in the situations and experiences they recounted (Langley and Meziani, 2020). In addition, I used the company documents to reconstruct these events over time and to triangulate my interview findings by gaining a deeper understanding of the context.

I was employed at MedCo from 2016 until mid-2019 and was directly engaged with TeamLoop as an employee in one of the pilot departments before I began my data collection in February 2020. Being so familiar with the case environment was at once challenging and rewarding. On the one hand, it worried me that I might be too familiar both with the story and the people involved, some of whom had been close colleagues. At the same time, trust and familiarity with the field can be useful factors, especially in terms of the data and contextual background accessible to me as a researcher (Flick, 2014). And while my role officially had shifted from an employee to that of a researcher with no remaining formal ties to the company, this could be described more as a process of moving in and out of different roles, being an insider and an outsider during fieldwork (Gosovic, 2018). To address this insider-outsider tension, I not only triangulated my interview findings with other sources such as reports and presentations but also checked my findings with peers as well as with my interviewees (Brannick and Coghlan, 2007).

The interviews were performed in two rounds. On entering the field and spending two days at the company in February 2020, I conducted eight interviews, with each interview lasting one hour on average. For this first round of interviews, I purposively selected interviewees with heterogenous backgrounds both in terms of their position in the organization and how they related to TeamLoop, including employees and managers from the two pilot departments as well as from departments that adopted the new practices later. After suspending my data collection for several months due to the outbreak of the Covid-19 pandemic, I then conducted a second round of 12 interviews with employees and middle managers. In my selection of interviewees for this round, I followed the flow of TeamLoop through the company by moving further away from the initial adopters and pilot departments. I also talked to individuals who

had decided not to adopt the new modes of organizing any further. (See Table 1 for a list of interviewees.)

Before settling upon my conceptual focus on momentum I had been interested in the more general question of how the new modes of organizing had dispersed in the company. Accordingly, I opened the interviews with the same open question of "Can you tell me your story with TeamLoop? How did you first come in contact with it and what has happened since?". While bearing my overall research interest in mind, i.e. how the new modes of organizing had emerged and been sustained within the organization, I kept the interviews relatively open and asked follow-up questions about emerging topics. My rationale for this was threefold: (1) to capture the temporal dimension needed for process-related data; and (2) to allow for themes to emerge that I had not considered when planning the study; and (3) to gain an observational distance to a field which I was already very familiar with.

Data analysis

Following each interview, as well as throughout my field visit in February 2020, I wrote notes to capture my analytical reflections and my thoughts about how best to proceed with the data-collection. After transcribing the interviews, I imported them into NVivo and read through them again. I also imported documents that were openly available in MedCo and which might have played a role in propelling the spread of the new modes of organizing in the company.

In a first step of data analysis, I used inductive open coding (Charmaz, 2006) and stuck closely to the interview data to allow new patterns to emerge. This seemed especially important as I wanted to gain some distance from my own theoretical ideas by immersing myself in the data since I was already so familiar with the case and had spent time trying to find theoretical explanations for what happened. Specifically, I used two types of open coding during this stage: In vivo coding staying close to the interviewees own language around how they experienced the development of TeamLoop, such as "it sparks curiosity" or "look where it is useful"; and process coding to capture certain events or points in time mentioned in the interviews, such as "first contact with TeamLoop" or "first workshop" (Saldaña, 2016).

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Table 2: Interviews conducted

Pseudonym	Position	Role in process	Duration
David	Employee	Joined pilot department 1	52 min
Anne	Employee	Pilot department 1	87 min
Sophie	Employee	Pilot department 2	51 min
Valentina	Manager	Other division	57 min
Natalie	Manager	Other division	40 min
Maria	Employee	Initially pilot department, now other division	53 min
Sebastian	Manager	Pilot department 2	49 min
Katharina	Top manager	Initiated process in pilot departments	60 min
Leon	Employee	Joined pilot department 1	63 min
Klaus	Manager	Other division	75 min
Matthias	Employee	Pilot department 2	72 min
Petra	Employee	Pilot department 1 (joined after initial pilot experiment)	52 min
Sabine	Employee	Pilot department 1	73 min
Ingrid	Employee	Other division	64 min
Lucas	Manager	Other division	68 min
Anja	Employee	Pilot department 2	71 min
Isabel	Manager	Other division	56 min
René	Line manager	Other division	54 min
Veronika	Line manager	Other division	48 min
Camilla	Employee	Other division	47 min

After open coding, I went on to map out the events and stages mentioned by my interviewees regarding how they become involved with TeamLoop and how they had perceived its spread in the organization. Although these were individual narrations, I found parallels in several of the stages and events, such as, for instance, mentioning a "tipping point", often in context of a collective experience such as a workshop, where the individual understanding of TeamLoop changed. It was during this phase that my focus on the concept of momentum emerged and that I settled on adopting a

communicative constitutive approach. In line with this perspective, I paid particular attention to mentions of commitment and efforts to engage with the new modes of organizing, further focusing on how the meanings attached to TeamLoop by organizational actors had developed over time. Keeping the concept of momentum in mind as a sensitizing concept, I then embarked on a phase of focused coding (see Saldaña, 2016). During this phase I coded for different kinds of communication and interactions through which the interviewees engaged with TeamLoop, including the sources of these interactions (presentations, workshops, conversations with peers, etc.), the communicative mode of their engagement, and the character of the commitment to TeamLoop in the interview passage. I also took note of the themes with which the interactions mentioned were concerned. As I further refined my analysis and drafted an analytical narrative, three predominant patterns emerged that characterized how momentum towards the adoption of the new modes of organizing had shifted over time in three phases: Enchantment, Ambiguity and Embodiment (Table 2). These three patterns comprise the three phases of momentum I identify in my analysis. As an example of how these patterns emerged from my data, I noted that when interviewees talked about a particular event that had cemented their commitment to TeamLoop they often described a physical experience and in the same sequence mentioned how this new mode of working and of spreading this mode in the organization had become closely connected to their sense of self-fulfillment at work. This observation later served as the basis for my identification of the "embodiment" phase of momentum.

Findings

My study findings show that the new modes of organizing at MedCo developed in three different phases of momentum around the notion of TeamLoop over time. These phases, which unfolded at different moments for groups and individuals across the organization, were connected both with the changing characteristics of momentum and different communicative dynamics of engagement. Thus, I found that the momentum for TeamLoop ebbed and flowed throughout the period observed, spiking during an initial phase of Enchantment, plateauing in a phase of Ambiguity, and later re-emerging in a phase of Embodiment (Table 2). While not strictly sequential, the data show distinctive patterns around these three phases, with Enchantment (Phase 1) being predominant in the beginning, Ambiguity (Phase 2) prevailing in a contested middle phase, and Embodiment (Phase 3) becoming increasingly salient later on. Whereas

phases 1 and 2 mostly correspond with traditional understandings of momentum as ebbing away after an initial peak, my analysis shows that the third phase, in which momentum became tied to actors' embodied experiences of TeamLoop, proved crucial for enabling the new modes of organizing to recur and persist in the long term without continuous managerial intervention.

Table 2: Three Phases of Shifting Momentum

	Enchantment (Phase 1)	Ambiguity (Phase 2)	Embodiment (Phase 3)
Dynamic of momentum	Spiking momentum	Plateauing momentum	Recurring momentum
Communicative modes of engagement	The notion of TeamLoop is predominantly communicated by management	Employees relate to the notion of TeamLoop more actively and critically	Employees transform the notion of TeamLoop according to their own interpretations
Character of commitment	Interpretive commitment to TeamLoop	Interpretive evaluation of TeamLoop	Embodied commitment to their own notions of TeamLoop
Predominant notion of TL	"Magic bullet"	Practical tool	Preferred way of working
Transition to next phase		'Cracks' form in the initially enchanting idea	Key events occasionally provide room for employees to develop their own meanings

Enchantment: Spiking momentum through interpretive commitment to management talk

In the first phase I identified, momentum for TeamLoop spiked beyond the two pilot departments as many employees throughout the organization initially became enchanted by what they interpreted as the promise of TeamLoop. While intense and

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widely recognized by the interviewees, this spiking momentum nonetheless soon began to wane as the enchanting promise became subject to critical questioning.

Interpretive commitment to TeamLoop. During this initial enchantment phase the experiences of the pilot departments with TeamLoop were shared within the organization in various ways, including through presentations at internal conferences, articles in the firm's internal magazine, announcements on the company's intranet and social media accounts, and through an open space meeting dedicated to TeamLoop. For instance, the company's magazine declared that "For us, TeamLoop is one possible response to the increasing complexity of the working world" and ran stories about the new modes of organizing, including a feature headlined "Discovering New Territory: The pilot project TeamLoop" with a lead-in worded "MedCo has put its mode of collaboration into question and ventured into uncharted territory. Read about the experience and its benefits starting from page 8." The visibility of the new modes of organizing was further increased as requests came from outside the company for newspaper interviews and for presentations about TeamLoop at practitioner conferences. Although the experiences communicated in these internal and external publications and events had originated in the pilot departments, these communications were initially mostly carried out both within the company and beyond by the head of the pilot departments and the CEO. In this way the word about the new modes of organizing initially spread through types of communication that members of the organization received in a largely passive fashion.

This high level of visibility raised awareness about TeamLoop and sparked many people's interest in learning more about the initiative. As one interviewee from the pilot department recollected, the "buzz" created about the new modes of organizing was especially impactful because of the enchanting promise it evoked of affording a more efficient and flexible way of collaborating to achieve more work with less people and thus of solving capacity problems in the company:

> People would say "TeamLoop. Isn't that where you can do more work with less people? And everything is agile? And then everything will be better?" […] And with that idea in mind they'd then often say "Well, can't we do this project using TeamLoop?" (David)

While the firm's internal communications described TeamLoop as a promising new mode of collaboration, people's understanding of the initiative was also influenced by a broader societal conversation underway at that time about the promise of agile and self-managing forms of organizing. As one of our interviewees suggested, this influence also

played a role in spiking interest in TeamLoop within the company and reinforcing its enchanting promise:

> And then there is also the trend factor – that everybody is currently talking about 'agility', 'self-management' and 'new work. And then of course people – leaders, managers… – become curious and start to actively ask about whether something like that is going on at MedCo. (Anne)

Within MedCo's rather hierarchical environment, the mainly management-driven communication about TeamLoop in this first phase effectively fostered a high level of awareness and legitimacy for the approach through the support of high-level advocates. As illustrated in the following quotation from a middle-manager interviewee talking about one of the advocates, this form of communication led many in the company to develop a strong interest in TeamLoop:

> She is – and I will say it again and again […] – the best ally we have in the company when it comes to TeamLoop. […] On the one hand, she is top management and represents hierarchy and the 'old system'. On the other hand, she also wants to establish this [TeamLoop]. (Sebastian)

The promising prospects of greater productivity and the high caliber of those advocating for the new modes of organizing inspired considerable interpretive commitment among employees to the enchanting notion of TeamLoop during this first phase. The head of the pilot departments perceived this commitment as increasing the chances of creating momentum and expressed this conviction explicitly in one external interview by saying "Here we can sense how a sort of pull effect develops among the employees and how curiosity is growing" (Head of Department, external interview). Employees also shared similar observations about widespread interest in and push for the TeamLoop approach:

> You don't need a board resolution to convince departments that traditional forms of hierarchical collaboration may be outdated. … Many already feel the pressure… they cannot handle the mountain of work the same way they've been doing it for the past 20 years. TeamLoop has very high-ranking advocates. ... so when they promote the whole topic through company meetings and so on, it's actually not surprising that there is a demand for it. (Maria)

Shift to the next phase: The enchanting promise forms cracks. The prospect of less hierarchical organizing practices being introduced as a consequence of TeamLoop also elicited some negative reactions among those who feared loss of power and potential chaos. As one interviewee remembered (David): "Often people would be, like 'Then everybody can do what they want and there are no bosses anymore!'." Some employees also suspected that it was all just the latest management trend or fad. Right from the

start, therefore, the excitement around TeamLoop was neither unanimously shared nor undisputed, as the buzz that enchanted and raised awareness about the initiative for most employees also raised suspicion and doubt in others. Although communication was effective in making employees aware of and able to orient themselves to the new modes of organizing, TeamLoop meant many different things to different people and not everybody wanted to engage with it or felt represented by it: "And you either have people who say 'This is once again the magic bullet!' and then you have those who say 'Complete nonsense! That's what we're already doing.'" (Valentina).

A key reason for such varied interpretations was that TeamLoop was communicated mainly in the form of management talk in this first phase and not so much through dialogue, thereby leaving room for misunderstandings and wishful thinking regarding the promise of its implementation. Some who had heard about the initiative developed high hopes that were later disappointed. As an employee from one of the pilot departments reflected (Sophie), "it's not the magic bullet that it was maybe touted as a little bit in the beginning. It does require a lot of time and energy before you can benefit from it." The way in which TeamLoop was talked about by upper echelon advocates thus also contributed to a certain degree of disconnection between the emerging notion of TeamLoop that people became aware of and often enchanted by and the interpretations of those who had already been engaging with the process for longer. Consequently, although a lot of momentum was built up in the short term, this initial spike soon plateaued and transitioned into a more ambiguous phase in which some abandoned TeamLoop while others made efforts to explore its practicability.

Ambiguity: Plateauing momentum as different understandings of TeamLoop are explored

As the initial excitement surrounding TeamLoop gradually waned and as cracks began to form in the narrative surrounding its enchanting promise, the new mode of organizing came under scrutiny from various perspectives. During this second phase in which the ambiguous meanings of TeamLoop were evaluated, momentum plateaued and even appeared to be at risk of dwindling away entirely. Surprisingly, however, this phase also provided space for new meanings of TeamLoop to emerge, thereby preparing the ground for momentum to recur in a third phase. Somewhat counterintuitively, what could be described as a general plateauing or even decline in momentum as a result of growing ambiguity in employees' understanding of TeamLoop ultimately served to facilitate a more sustained momentum in the long run.

Interpretive evaluation of TeamLoop. During this phase of ambiguity, initial adopters in the pilot departments as well as the broader audience in the company started to evaluate their initial interpretations of TeamLoop in the context of their own teams, roles, and modes of work. Those who had become aware and interested in the first phase now set about seeking out more information and further guidance for potentially adopting TeamLoop among their own groups. While they had initially become aware of TeamLoop through the communication activities carried out by management, however, the initiative was not further implemented in a concerted fashion. As the head of the pilot departments explained when asked whether a roll-out was planned (Internal magazine 2018, p. 13): "Here too we rely on pull instead of push. You can't force processes toward self-responsibility and agility upon people from the top down." Employees seeking to adopt or to engage further with TeamLoop thus now had to seek out information and guidance on their own initiative.

Guidance in such cases was provided by employees of the pilot department, some of whom acted as voluntary facilitators, and later on by a newly established change unit, both through informational meetings and through practice-based training such as introductory workshops available upon request. Unlike in the previous phase, when employees had mostly been on the receiving end of management communication, these formats provided space for dialogue about TeamLoop at eye level. In these meetings and workshops, participants were able to attain a better understanding of what TeamLoop was about and to evaluate its practicability in their own contexts. As such, these events had the potential to build informed commitment. For example, one volunteer facilitator from a pilot department declared that these meetings had deepened their understanding of what the initiative could and could not deliver:

> Once you start to understand how it's all connected and somehow weigh up the costs and benefits, also as a manager from an entrepreneurial point of view, then the advantages will outweigh the disadvantages. And that creates demand – a well-reasoned and fact-based demand. (David)

In addition, many interviewees emphasized that such exchanges at eye-level were needed to ensure that "the departments who say 'we want to do it too!' really ask themselves in advance 'what is it that I really need? Is it TeamLoop or is it maybe something completely different?'" (Valentina). These interviewees perceived the conversations they had held in Phase 2 as a counterbalance to the hype generated about TeamLoop in Phase 1 and as a valuable means of gaining a more realistic perspective. In many cases, participants concluded that TeamLoop was not really what they had hoped

for or what they needed, especially so as some of the myths that had emerged during the first phase about what TeamLoop could and could not do were dispelled:

> For us I think it was a group dynamic, and that's why it may have flattened out quickly too, because you had the feeling that this [TeamLoop] is not something I can work with. (Leon)

Interest in adopting the new modes of organizing also waned among some employees as the amount of work required to implement them became more obvious:

> It started with high motivation. However, it soon became clear that a lot of things would need to be reconsidered, that it requires a lot of additional effort. And when daily tasks came into play, of course, then this wave flattened out a bit again. (Matthias)

In some cases the workshops actually led to greater confusion as participants perceived a mismatch between what had initially been communicated about the initiative and how those already working with TeamLoop described it in practice:

> For me it wasn't sufficiently clear what was truly different, so I couldn't make that leap for myself. And then I developed a certain aversion because you quickly start to think 'Oh, this somehow just feels like the next fad, and it's just called something different now.' (Veronika)

As these quotations suggest, the frustration of not being able to engage easily with the promised solution was one factor that led people to re-evaluate their commitment. However, not all of the interviewees who expressed such feelings turned their back on TeamLoop altogether. For instance, one interviewee (Natalie) who had initially felt frustrated during a workshop later managed to turn this into an opportunity for useful dialogue with the workshop facilitators: "We were a bit frustrated after the first day. It needed to be far more concrete. So I told them… And there was a really interesting dialogue that came out. And then the second day it was already more concrete what it is and how it can help us." In such cases the workshops provided an opportunity for participants to re-evaluate more realistically what the modes of organizing could do for them.

Simultaneously, some of the employees in the pilot departments who had adopted TeamLoop in the first place had grown quite frustrated with how the broader meaning of TeamLoop had been shaped within the company mainly by the way MedCo's management had chosen to communicate the idea. In the view of these employees, such top-down dissemination could be perceived as at odds with the less hierarchical ideal inherent in TeamLoop. Whilst acknowledging that such top-down communication had been successful in raising awareness and generating excitement,

they stated that it might actually be "counterproductive to act too 'evangelistic'" about the promise of TeamLoop, insisting rather that "it ultimately has to be self-motivated" (David). According to these employees, this was because the enchanting "magic bullet narrative" that initially emerged had not accurately portrayed how the new work practices were used and which promises could or could not be kept.

This careful and critical evaluation caused momentum for TeamLoop to plateau, especially as many came to the conclusion that the new modes of organizing were not what they thought they would be, with some even going so far as to declare that "It's just a mirage with nothing behind it" (Camilla).

Employees start to develop their own meaning of TeamLoop. While the apprehensiveness and questioning that characterized this phase of ambivalence caused momentum for TeamLoop to plateau, it also opened up spaces for new meanings to develop and thereby paved the way for a shift towards a third phase of momentum. In particular, those who sought out further guidance were able to develop a more technical understanding of the new modes of organizing and their application in practice, enabling them to gain a more informed perspective than the "magic bullet" promise that had initially emerged. For some the initial excitement they had felt was now superseded by new perspectives more closely tied to the applicability and suitability of TeamLoop in practice. As one interviewee recalled, "That was the first time I got a real explanation [about TeamLoop] – one I also understand well enough to explain it myself" (Sebastian). For another interviewee (Isabel), it was more of a process she had used to develop her own understanding: "Someone has to explain it to you how it works and then you have to experience it. And I think that happened step by step through learning by doing."

For those who did decide to stick with TeamLoop, this phase of ambiguity helped prepare the ground for momentum to recur in a third phase. Indeed, the ambiguity surrounding TeamLoop also created the space needed for employees to develop their own interpretations. Notably, the workshops not only provided further explanations but also provided employees with a space for reassessing how TeamLoop could be useful and what it could mean for them:

> There was no reasonable motivation for it before. It was motivated by this idea from the [CEO]. But with the knowledge I have today I see it differently. And I also fully stand behind it now because it makes sense now. (Sebastian)

This quote reflects how the phase of ambiguity and plateauing momentum provided time and space for a transition from the initial hype towards a deeper understanding of

TeamLoop. As evidenced in the previous section, some employees started to develop their own understanding of TeamLoop independent of and uncoupled from the initial idea communicated by management.

Embodiment: Recurring momentum through embodied commitment

Over time the momentum for TeamLoop recurred and persisted as more employees stopped trying to make sense of or embrace the initial management narrative and instead began making the initiative their own by ascribing their own interpretations. In this way they eventually revived and perpetuated the momentum for TeamLoop in a subtle but sustainable dynamic that was decoupled from the first phase. My data indicate that this third phase of momentum was ultimately enabled by an embodied sense of experience rooted in employees' own sense of themselves at work.

Embodied commitment to a transformed notion of TeamLoop. At a time when overall momentum for TeamLoop was plateauing in the organization and looked at risk of fizzling out after often one-off introductory workshops with little follow-up, some people in the company experienced quite the opposite, instead developing a deeper commitment to the new modes of organizing according to their own understanding and experience. Indeed, some interviewees talked of a tipping point in the context of such workshops or other practical experiences that not only changed the meaning of TeamLoop for them but also how they related to it going forward: "The point that really changed things for me was this one workshop. […] That's really a moment I can pinpoint and say 'That changed it!" (Sebastian). Notably, interviewees often used bodily metaphors when relating these pivotal experiences to describe how a notion of TeamLoop had taken root:

> I can't recall precisely when it was. But there was a point when I felt it had become second nature [*in Fleisch und Blut übergehen*][2] and it became so important that I didn't want to go back again. (Anne)

> That first workshop was what really enthralled me [*hat mich gepackt*].[3] When the coaches talked about what's behind it. … And I thought to myself 'This is actually genius!'. (Valentina)

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[2] Most of the interviews were conducted in German. In some instances, no literal translation of the expression used to describe the physical experience exists in English. In those cases I have included the German original. Here the original phrase literally translates as "it became my flesh and blood".

[3] A literal translation here would be "it grabbed me".

The ways in which these employees engaged with the new modes of organizing and their reasons for doing so now differed from and went beyond the largely symbolic realm of language-based communication that had initially evoked enchantment and later ambiguity in the previous two phases of momentum. Instead, as the preceding quotes illustrate, the form of commitment that enabled the momentum for TeamLoop to re-emerge during this phase ensued from an *embodied* sense of engagement induced gradually or quite abruptly through significant encounters and conversations.

Whereas the ambiguity that had prevailed in the previous phase was characterized by employees trying to make sense of the initial management-driven communication, the development of an embodied sense of TeamLoop in this third phase was not compelled by further internalizing the management narrative. In this phase the meaning of the new modes of organizing was largely decoupled from how it had initially been communicated and people transformed the idea according to their own interpretations and experiences. As one interviewee commented (Sebastian): "Before it was something imposed from above – something that had nothing to do with how we now understand TeamLoop – the way I understand it now and the way we're living it now." As part of this development, another interviewee reflected that even the name TeamLoop "was almost perceived as a bad word by now" (Anja), and some employees even started to use their own synonyms as a way of linguistically marking their transformed understanding of their new ways of work.

Perpetuation of momentum as embodied presence. The transformed understanding of TeamLoop among certain committed employees was carried into the wider organization in multiple ways, including both intentionally and unintentionally. Those who had adapted TeamLoop or some version of it were by now starting to incorporate the new texts, meeting routines, and decision-making processes into their work. As one interviewee (Lucas) explained, "That's why [TeamLoop] is essentially always there – because we live it and also unconsciously set an example of it." In doing so, these employees inevitably affected others with whom they cooperated in other parts of the organization. Some also started consciously (re)producing their own transformed notion of TeamLoop in their interactions with others. Statements by interviewees such as "I tried to push it [TeamLoop] whenever possible" (Maria) confirm that some were now intentionally and actively advocating for the new modes of organizing.

At the same time, a less obvious mode of perpetuating momentum now also came into play. As one interviewee observed, those who were committed to their idea of

TeamLoop exuded "something like an enticing radiance *[Strahlkraft-Effekt]*" (David) that was readily perceived by others. According to one interviewee, this attitude "is more like a kind of religion, a mindset… while many others in the company see [TeamLoop] purely as a tool, a means to an end." (Leon). This radiance and enthusiasm also manifested itself in a departure by some employees from the company's established cultural codes and norms. For instance, one interviewee (Anne) observed how her male colleagues had started to dress in a less formal way: "When I started working here, [one colleague] used to come in every day wearing a suit and tie. Now I haven't seen him in a suit for ages. [Another colleague] too always used to wear a suit and tie and didn't dare to grow a beard." Another remembered how "within a few months … everyone was on a first-name basis with each other" (Lucas) though it had hitherto been the norm to use formal forms of address, at least in the German-speaking part of the company. The new modes of work were thus not only experienced as embodied by those who were engaging with them directly but also by others who observed such embodiment and grew curious about the practices. The new ways in which TeamLoop was perpetuated in this phase thus went beyond the largely symbolic realm of conversations, instead now reflecting an embodied affective experience on the part of committed employees that afforded a projection surface for the co-orientation of others.

In sum, the momentum that recurred in Phase 3 was more subtle and manifested very differently from the momentum that had spiked in Phase 1 and plateaued in Phase 2. This fresh momentum was sustained by employees' commitment to their own notions of the new modes of organizing and proved so persistent that some of these employees stated they would rather leave the organization than return to the old ways of organizing. For example, one interviewee (Valentina) said that while she and her team could of course always fall back on the classical ways of organizing, "I'd really like to avoid that. Because I won't stay for that. Then I [will] leave too." Another emphasized that she was no longer worried about TeamLoop being dropped because a point of no return had been reached that meant the level of disappointment caused by dialing back would cause too much damage:

> I used to be worried before that the topic might be dropped again. That was definitely a concern of mine. But at some point that worry was gone. I felt we'd come so far in this process that it was impossible to dial back. It would cause incredible damage if they took this way of collaborating away from us now. (Anne)

As these quotes demonstrate, it had become virtually impossible by this point to detach the new modes of organizing from employees' embodied experiences. One interviewee

(Lucas) pointedly said in this context, "this [TeamLoop] is not something that is somehow written down somewhere and when I cross it out, it's gone." As these data show, it would have been impossible to disconnect this transformed notion and experience of TeamLoop from those employees who had internalized it in their own bodies.

Overall, my data suggest that whereas the initial top-down buzz generated around TeamLoop created a spiking momentum for the initiative that soon petered out, it was the embodied commitment by a small number of adopters that ultimately sustained the new modes of organizing from the bottom up. In short, it was these employees' transformation and incorporation of these new ways of working that cumulatively added substance to the TeamLoop initiative to such an extent that the idea was perpetuated and became a surface for co-orientation without continued managerial intervention.

Discussion and conclusion

This paper has explored how momentum can emerge bottom up and unfold over time beyond and independent of strategic intervention. My findings and analysis have evidenced and elucidated how the new modes of organizing introduced into the case firm led to the emergence of three different, although not mutually exclusive, types of momentum over time: Enchantment, Ambiguity, and Embodiment. Thus, although the initial buzz surrounding TeamLoop generated considerable momentum, this "enchantment" proved fleeting and soon transitioned into a contested phase of ambiguity in which momentum plateaued and appeared at risk of dwindling away entirely. Over time, however, momentum for TeamLoop re-emerged from the bottom up as some individuals started to ascribe their own meanings to TeamLoop, attaching themselves deeply to the idea and perpetuating it based on their transformed understanding rather than the original management-driven concept. An especially notable insight from my analysis is that this re-emerging momentum was intricately linked to a sense of embodiment whereby a transformed and appropriated understanding of the meaning of TeamLoop had become an integral part of these employees' sense of being at work. My analysis has highlighted the significant role played by such transformed, appropriated meanings and subsequent embodied commitment in the emergence of bottom-up momentum in the first place and in the perpetuation of this momentum over time. As such, my study further makes the case for

recognizing momentum as a force that animates organizational life beyond planned change and strategic intervention. Below I outline how adopting a communicative constitutive view helped uncover these insights and how they contribute to the existing literature on momentum.

Applying a communicative constitutive approach (Ashcraft et al., 2009; Taylor, 2009; Taylor and Van Every, 1999) as a novel theoretical lens on momentum provides an understanding of how TeamLoop entered MedCo as a new "text" that served as a surface for co-orientation as individuals projected their hopes onto this promising new mode of organizing (see also Kuhn, 2008). Prior studies have highlighted the importance of managerial action to generate momentum (Dutton and Duncan, 1987; Jansen, 2004, see also Wiebe et al., 2012). Similarly, ideas about TeamLoop were described and stabilized through continuous reproduction, especially through the initial top-down communication of the idea, crystallizing as a new text to which members of the organization could co-orient themselves. This was especially evident in the first phase of enchantment when many projected their hopes onto this promising new mode of organizing. This initial momentum for TeamLoop spiked as it entered people's conversations and as its hopeful promise was perpetuated in communication that generated excitement among employees and led them to strive to make sense of this new mode of organizing. Such momentum soon plateaued, however, as people's initial enchantment with the idea proved transient and unsustainable.

Adopting a more conventional and strategic view to analyze how momentum unfolded in my case would probably have led to the conclusion that initial momentum for TeamLoop had plateaued because it was not managed in a consistent manner. After all, initial momentum is often thought of as a means to prepare the ground for generating continued momentum towards a goal (Dutton and Duncan, 1987; Jansen, 2004; Turner et al., 2013). By contrast, applying a communicative constitutive approach in my analysis led me to quite a different interpretation of the case that yielded valuable new insights into the role and nature of momentum in organizations. From a communicative constitutive perspective, the initially management-driven communication about TeamLoop can be understood as having propagated a particular meaning that closed off other potential interpretations of what it might and might not mean. As Vásquez et al.'s (2016) insights on the (dis)ordering dynamics of communication suggest, momentum may easily be stifled if meanings are too closed off, in this way constraining the perpetuation of momentum in and through communication, i.e. preventing the active

(re-)negotiation of meaning that precisely characterizes momentum in a communicative constitutive understanding. The same could also be said of the introductory workshops conducted to disseminate the idea, with some participants experiencing disenchantment as they were "taught" what TeamLoop was actually about, dispelling the hopeful promise of TeamLoop and the meanings these employees had projected onto the initiative.

As initial momentum for TeamLoop plateaued and was replaced by a phase of ambiguity, however, more space opened up for those still interested in the idea to develop their own understandings of the initiative. Although this interpretive space only opened up after the initial hype had subsided, some employees already experienced such space in the introductory workshop settings where they were able to engage more actively with TeamLoop and negotiate its meaning. This room for interpretation increased over time as management became less involved with TeamLoop. Crucially, although this opening up of meanings in the phase of ambiguity initially seemed to indicate that momentum for TeamLoop might ultimately subside because it meant so many different things to different people, I argue that it was precisely this particular interplay of fixing and opening meanings that ultimately prepared the ground for momentum to re-emerge, this time from the bottom up (see Vásquez et al., 2016). As my data confirm, the new and transformed meanings of TeamLoop developed in this phase slowly but surely stabilized to form an alternative surface for co-orientation detached from management-driven communication.

A further key insight afforded by analyzing this case from a communicative constitutive perspective is my finding that some employees felt that their own transformed notion of TeamLoop had become an integral part of themselves at work over time, describing it as something that had taken root in their bodies and which they emanated in a way that was perceptible even to their colleagues who were not engaged with TeamLoop. Previous research (e.g. Dutton and Duncan, 1987; Kelly and Amburgey, 1991), and especially Jansen's influential article (2004) on momentum for strategic change, has similarly alluded to such abstract influences on momentum, albeit in a more general way, referring to "energy" without specifying what such energy might consist of beyond a certain intensity of commitment to a particular path. Again, here a communicative constitutive understanding can help explain how my interviewees' interpretive commitment to their own transformed notions of TeamLoop eventually transcended the boundaries of language and took root in their bodies. As Wright (2016,

2019) has shown in his work on embodied organizational routines, the text-conversation dialectic that characterizes how organization is (re)produced from the perspective of a communicative constitutive understanding can develop an embodied intensity as actors reproduce organization in embodied citational patterns (see also Ashcraft et al., 2009). Such embodied reproduction of organizational processes is clearly evident in my data, with interviewees stating that TeamLoop and all it entails had become "second nature" to them over time – or literally their "flesh and blood" in the German original. According to these interviewees, once they had begun to make TeamLoop their "own" it became engrained not only in their language at work but also influenced other cultural norms such as their way of dressing, further manifesting in a more abstract way as an embodied presence and commitment they now brought to work.

Such embodiment was particularly evident in observations made by my interviewees of how those employees who had adopted TeamLoop in their work emanated a certain radiance. This in turn indicates both that the new modes of organizing exerted an affective "pull" on some employees as they interpreted and practiced them over time and that this pull was sufficiently strong as to be perceptible both to adopters and others in the organization, manifesting in ways beyond these adopters' use of a new language and their development of a critically informed evaluation of the new modes of organizing. In this way these affective attachments formed by employees engaged in the new practices also served to spread and perpetuate interest in and momentum for TeamLoop among others in the organization (see Kuhn et al., 2017). Here it should be reiterated, however, that the embodied commitment to TeamLoop which facilitated such affective attachment and perpetuation had only become possible once certain employees had developed a transformed understanding of the new modes of organizing and made the ideas associated with TeamLoop their own. Ultimately, I argue, momentum was only able to recur and be sustained in a more bottom-up fashion after employees had developed a personal embodied commitment to the initiative and the meanings they ascribed to their new ways of working.

Contributions

Taken together, my study makes three interrelated contributions to the literature on momentum. As a first and general contribution, my analysis expands our understanding beyond the focus on leaders as main drivers of momentum. It offers a more balanced and nuanced perspective than previous studies that have mainly foregrounded the

significance of leaders in driving momentum (Dutton and Duncan, 1987; Jansen, 2004; Jansen and Hofmann, 2011). In particular, I have highlighted the potentially transient nature of momentum generated solely through top-down communication and strategic intervention. Unlike previous approaches taken in the literature that might have led me to end my analysis at the point when momentum for TeamLoop plateaued, the perspective I adopted in my study helped reveal how momentum can persist and re-emerge even after initial enthusiasm has subsided when efforts to maintain it become bottom up rather than top down. In line with one of the key aims of this paper, my study thus empirically demonstrates how momentum can recur and be sustained from the bottom up without continuous managerial intervention.

Second, my study offers an empirical exploration of prior theoretical conceptualizations of bottom-up momentum. My findings confirm the notion of "social contagion" and the force of cumulative actions highlighted by Jansen (2004, see also Jansen and Hofmann, 2011) in the context of bottom-up momentum. At the same time, however, my account extends beyond the idea inherent in the social contagion metaphor that mere "virality" is the primary marker of successful momentum. For while a form of contagion did indeed drive momentum in my case, in the sense that the ways in which certain employees embodied and emanated their commitment to TeamLoop attracted the attention and interest of other employees, this perpetuation of momentum occurred in a more subtle and non-linear manner. By applying a communicative constitutive approach, therefore, my analysis extends our understanding beyond a linear notion of communication as transmission (see Axley, 1984) and reveals the limitations of targeted top-down communication. More specifically, my study shows how the emergence of new meanings can generate momentum independently of initial managerial messaging.

Third, as a wider implication of my findings, my study makes the case for conceptualizing momentum as an organizational influence more generally, highlighting the relevance of the concept beyond the context of organizational change (see also Kremser and Sydow, 2022). By this account, all organizational processes – whether large-scale and exceptional or habitual and everyday – require a certain degree of momentum to persist.

Limitations and outlook

My study has several limitations that, in turn, suggest promising new avenues for future research. First, it is not fully clear what would have happened in my case if top

management had mandated a strategically planned roll-out of TeamLoop. Although some prior research suggests such a comprehensive top-down initiative would probably still have elicited some degree of commitment (Dutton and Duncan, 1987; Jansen, 2004, see also Wiebe et al., 2012), my findings suggest that a longer-term change process flanked by change communication could have resulted in a closing-off of potential meanings or alternative interpretations (see Vásquez et al., 2016). The bottom-up momentum that emerged as a result of the intense embodied commitment that evolved among certain employees to their own interpretations of TeamLoop may not have been possible to the same extent. More research is needed to explore this interplay and the fluctuations between top-down and bottom-up influences on momentum.

Second, the kind of bottom-up momentum I observed could have been stifled if countered by powerful opposition in the organization (see Wiebe et al., 2012 on momentum and managerial agency). As it transpired, however, MedCo's management refrained from any attempt to rein in or curb the enthusiasm of those most committed to the new modes of organizing. This was in part because those who perpetuated momentum from the bottom up still used the label of TeamLoop even though it meant entirely different things to different people. As such, it would have appeared insincere of management if they had tried to restrict something that they had initially come up with and promoted. Future research could usefully investigate these dynamics in more detail to clarify how bottom-up momentum would behave when met with powerful opposition. Finally, although interviews provide appropriate data for this kind of study insofar as momentum is an interpretive subjective perception, future research could incorporate other in-depth forms of data such as observations and interaction-based data from meetings and other instances of internal organizational communication.

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Paper 3.

Cultivating dispersed collectivity:

How community participation matters for employee activists

Anna Stöber and Verena Girschik

Employee activists who pursue a social purpose at work often face harsh headwinds and find their efforts frustrated as they attempt to drive change from within their companies. They may therefore seek support in communities that center on their social purpose but reside outside their companies. Our manuscript seeks to advance our understanding of how employee activists' participation in such inter-organizational communities shapes how they experience their change agency. Grounded in an in-depth qualitative study of an inter-organizational community of employee activists, we find that community participation generates what we call dispersed collectivity: by cultivating collective momentum and empathic connections, employee activists come to feel part of a bigger movement even when they return to their companies. Dispersed collectivity enables employee activists to reconceive the courses of action they can viably and meaningfully take to drive change. Specifically, they develop a repertoire including conceptions of change agency as resilience, emancipation, and liberation. Our study contributes to the literature on employee activism by detailing how activists cope with the constraints of their change agency in their corporate lives and by offering a nuanced view of the potential and limitations of inter-organizational communities for mobilizing and sustaining employee activism.

Introduction

Recent literature has emphasized the transformative potential of employee activism, i.e. the efforts of employees passionate about a social purpose to change corporate practices from within their company (DeJordy et al., 2020; Girschik et al., 2022; Schifeling et al., 2022; Wickert and de Bakker, 2018). As corporate insiders, employee activists have access to internal knowledge and political processes, which puts them in a position to effectively frame issues and use persuasive tactics to micro-mobilize others (Briscoe and Gupta, 2016; Gond and Moser, 2021). Despite these advantages, employee activists often face adverse conditions, and their portrayals as "activists in suits" (Carollo and Guerci, 2018) or "tempered radicals" (Meyerson and Scully, 1995) alert us to the difficulties of being an activist inside corporate walls. Indeed, people breaking with corporate social norms and practices may experience opposition or sanctions from powerful actors (Kellogg, 2012; Soule, 2012), as well as social exclusion, shaming, or ridicule from colleagues (Kenny et al., 2020; Scully and Segal, 2002). To avert these social sanctions, people may feel that they have to hide their non-conformity behind a "corporate mask" (Scully, 2015).

For support, many employee activists benefit from participation in communities that center on their social purpose but reside outside their corporate lives. Inter-organizational ties, are well-known to provide external legitimacy and leverage for employee activists (Buchter, 2021; DeJordy et al., 2020). In addition to strategic mobilization purposes, however, such communities matter for individuals because they allow them to take off their professional mask and connect with people who share their concerns (Kociatkiewicz et al., 2021; Meyerson and Scully, 1995). Indeed, because they are external to the corporations in which their members work, they can function as free spaces as they liberate people from the dire constraints of their daily lives (Furnari, 2014; Rao and Dutta, 2012). Such communities can thereby provide opportunities for defining new courses of action aimed at challenging the status quo (Creed et al., 2022; Villesèche et al., 2022). Communities can thus be considered a crucial organizational force that sustains activism and effectuates change across organizational boundaries (Skoglund and Böhm, 2022).

While communities can undoubtedly make a difference for employee activists, we still know relatively little about whether and how community participation shapes how employee activists experience their change agency as they pursue their social purpose in their corporate lives. There is a risk that such communities constitute a parallel world,

thus leaving employee activists oscillating between the community and their companies. Exploring how employee activists connect both worlds, we adopt a phenomenological view on change agency that foregrounds their experiences of their "place in the world" and of what courses of action they may meaningfully undertake to drive change (Creed et al., 2022; see also Coole, 2005). To sensitize us to employee activists' experiences, we begin our study by diving deeper into the tensions inherent in challenging the status quo from within. We then explore how communities may shape their experiences of their change agency.

Our research is grounded in an in-depth case study of an inter-organizational community of employee activists who advocate for a more "self-determined and meaningful world of work" (as stated on their website). By the time of the study, the community had grown to around 200 members from more than 90 corporations based in Germany (note that it is not the organizations that obtain membership but that individual employees become members). The community is not for profit and is organized entirely through the voluntary work of its members. Our data collection consists of observational data collected by the first author, who participated in the community and their online platform as a researcher from March 2021 until early 2023, as well as in-depth interviews with community members.

Our study finds that participation in the community offers employee activists a space to collectively experiment with alternative practices that align with their aspirations, thereby creating collective momentum. Moreover, the community makes it possible to take leave their professional façade behind and cultivate a sense of belonging through emphatic connections. Employee activists carry these community experiences into their corporate lives through what we term "dispersed collectivity," i.e. a sense of connectedness with their community even when at their workplaces. Dispersed collectivity functions like a prism through which employee activists reconceive the tensions between their transformative aspirations and the corporate reality of their workplace. Thereby, community participation shapes what employee activists perceive as viable, desirable, and sustainable courses of action for themselves to undertake. Specifically, dispersed collectivity makes them feel part of something bigger, which in turn allows them to reconceive their experience of change agency in three ways: as resilience, as emancipation, and as liberation.

Our study contributes to the burgeoning literature on employee activism by offering a more nuanced view of the potential and limitations of communities for

mobilizing and sustaining employee activism. By showing how community experience can help employee activists reconceive the repertoire of viable courses of action available to them, our study not only has implications for understanding how employee activists sustain their activism despite the challenges they often face. It also challenges us to revisit our ideas about how employee activism manifests and to broaden our perspective to reappreciate piecemeal change and more subtle expressions of change agency.

Employee activism: transformational aspirations meet corporate reality

Employee activism is fraught with tensions. On the one hand, employee activists are well-positioned to act on their aspirations seeing as they benefit from insider knowledge, access to political channels, and resources, that they attempt to leverage for their purpose (Briscoe and Gupta, 2016; Wickert and de Bakker, 2018). Yet on the other hand, being positioned "under the umbrella of management," employee activists more often than not find themselves constrained (Scully and Segal, 2002). Companies generally uphold strong norms defining what roles and what courses of action are considered viable and desirable, and these norms constrain what roles employee activists can construct and perform. For example, Wright and colleagues (2012) have shown how sustainability managers engage in identity work to negotiate the tensions between their sense of self and the constraints of the work context.

Activist roles tend to be most acceptable when they are either mandated by management or when they are tied to "feel good" initiatives, such as recycling programs (Boiral, 2009; Norton et al., 2015). In such roles, employee activists may contribute to the company's strategy as well as its reputation externally and internally, thereby earning the support and protection of management (Scully and Segal, 2002). Instead of being put in a position to challenge the status quo in ways that are meaningful to them, however, employee activists experience that their aspirations are curtailed and re-written to match the corporate program (see, e.g., Wright and Nyberg, 2017). Effectively co-opted into corporate agendas, these roles may appear agentic while conforming with and reinforcing existing practices and norms (Girschik et al., 2022).

However, when employee activists deviate from their mandate and challenge power relations or dominant ways of thinking and doing, they and their efforts may become the targets of "institutional blockers" invested in defending the status quo (Levy and Scully, 2007; see also Lawrence and Suddaby, 2006). Colleagues and managers who defend the status quo may meet activists with eye-rolling and other forms of shaming

and micro-aggressions (Carollo and Guerci, 2018; Scully and Segal, 2002), they may silence, degrade or exclude them (Decelles et al., 2020; Hafenbradl and Waeger, 2017; Kenny et al., 2020), and even undermine their careers (Meyerson, 2008). Because employee activists depend on their target organization for their missions (Briscoe and Gupta, 2016), they must walk a tightrope between passionately pursuing their aspirations and pragmatically adjusting to corporate reality.

Overall, employees' dependence on their company renders their activism inherently fragile, and they must therefore often settle for incremental and piecemeal change despite their transformative aspirations (Scully and Segal, 2002; Skoglund and Böhm, 2020). Employee activists are often well-aware and reflexive about the instrumentalization and cooptation of their passion to serve corporate agendas, and the salient discrepancy between their transformative aspiration and the rather dreary corporate reality is a disheartening and utterly frustrating experience that can dampen their experience of meaning and purpose, thereby making it difficult for activists to sustain their change efforts (Carollo and Guerci, 2018; Driscoll, 2020; Wright and Nyberg, 2012). Therefore, many employee activists seek out communities where they can connect with like-minded people outside their companies. Indeed, Meyerson and Scully's influential work on "tempered radicals" (Meyerson and Scully, 1995) already emphasized the importance of outside communities as sources of "emotional support, and, perhaps most important, empathy" (597).

How communities matter for employee activists

As O'Mahony and Lakhani (2011) show, the concept of community in organization studies is fuzzy and comprises many different definitions of communities and subfields of research which highlight the different manifestations and affordances of communities in and around organizations. Following Brint (2001: 8) we generally define communities as "aggregates of people who share common activities and/or beliefs and who are bound together principally by relations of affect, loyalty, common values, and/or personal concern (i.e., interest in the personalities and life events of one another)." We are specifically interested in communities "between" organizations, i.e., where activists from different companies meet and extend this definition to such inter-organizational communities. While it is well known that employee activists collaborate with outsiders to advance their causes (e.g., Binder, 2022), participation in a community entails that

people form meaningful relations around shared purposes and thereby construct a sense of belonging (Garrett et al., 2017; Kociatkiewicz et al., 2021).

In professional contexts, such communities usually take the form of professional networks. Professional networks are well-known to allow members to pool resources and solve practical problems collectively (O'Mahony and Lakhani, 2011). Research on communities of practice has long established that such exchanges among professionals who share common skills, interests, and aspirations can help them to develop their skills further and acquire new knowledge which, in turn, helps them to become better at their job and advance their careers (Wenger, 2000; see also Nicolini et al., 2022 for a review). Research on feminist business networks has shown that employee activists may seek such professional exchanges to boost their resources and problem-solving skills, thereby potentially enabling them to become more skilled and resourceful in their change efforts (Petrucci, 2020; Villesèche et al., 2022). However, in and by themselves, such professional exchanges might not succeed in cultivating an authentic sense of community not in disrupting organization-level practices.

Beyond the strategic pursuit of activities aimed at driving change, however, studies of social movements suggest that a community's appeal can lie in that it provides an alternative world at a distance from the institutions that otherwise dominate people's daily lives. When offering a trusting space that invites participants to reflect on, challenge, and redefine prevailing social norms without having to worry about a potentially hostile environment (Reedy et al., 2016), communities can experiment with prefigurative practices; i.e. enacting the ways of thinking and doing that the activists are committed to acting toward in the here and now (Yates, 2015; 2021; see also Graeber, 2002; Maeckelbergh, 2011). While usually small-scale, such experimentation with alternatives plays a key role in societal change in that they contribute to activist activities that target the status quo more contentiously (De Coster and Zanoni, 2022; Skoglund and Böhm, 2022).

For individuals, participation in such communities may constitute a transformative experience insofar as it opens new horizons, enabling people to envision new possibilities and to initiate changes in their lives (Ehrnström-Fuentes and Biese, 2022; Reinecke, 2018; Skoglund and Böhm, 2020). Indeed, Creed et al. (2022) have argued that participation in communities may shape a person's experience of themselves and their place in the world and influence how certain social issues come to matter for them, and why and how they feel compelled to engage in social change. Such transformative

potential notwithstanding, employee activists depend on their company for their missions and will thus return to their corporate lives. Since their experience of their role in the world and their change agency is relationally constructed, context-dependent, and therefore potentially precarious, the question arises of whether and how community experiences still shape employee activists' experiences at work. We sought to provide new insights into this question through an in-depth empirical study of an inter-organizational community of employee activists.

Empirical context and methods

Research context

Our study focuses on a German inter-organizational community of employees who advocate for and promote a more "self-determined and meaningful world of work" in their companies, as stated on their website, eventually aiming to change the way we work on a societal level. It was founded in 2017 by 12 employees of different well-known German companies to foster exchanges about more self-determined and meaningful forms of organizing. While definitions may vary in practice, in academic terms "self-determined" generally refers to a higher degree of shared authority concerning how tasks are allocated or decisions are taken (Diefenbach, 2020); while "meaningful" pertains to the subjective assessment of work and tasks as being a source of purpose or of value by those who have to do the work (Michaelson et al., 2014). The founding members had come together at different meetups about more self-determined forms of organizing before but had experienced that most of the discussions in existing contexts focused largely on startups and smaller businesses, and they shared the perception that the challenges of promoting new forms of organizing were different and more formidable in the corporate sphere.

By the time the first author joined the community, it had grown to around 200 members from more than 90 companies. Membership is free and held by individual members rather than their organizations, allowing members to stay members even if they change jobs. Members hold a variety of different roles in their companies and we formally interviewed 15 employees of 14 different companies. While many of them are, as per their organizational role, change agents of some sort, their exact job functions vary and include, for example, generalist in-house consultants, IT professionals, facilitators in the transition towards more sustainable business practices, or union representatives. The community is not for profit and is organized entirely through the voluntary work of its

members. To avoid the community becoming a marketplace for consultancy services, one can generally only become a member if one works for an established company and not, for instance, as an external consultant. This rule, however, is currently being re-negotiated as many members leave their corporate roles to start their own companies.

We decided to focus on this community because it publicly espouses its purpose as bringing together employee activists and making a difference for society by combining efforts across and between organizations. The transformative aspiration to change the way we work on a societal level was not only conveyed in the publicly available data but also during initial conversations the first author had with several members. Importantly, the community consists exclusively of people in employee-, or lower- to middle-management roles, which made this a particularly fascinating case to study how inter-organizational communities matter for employee activism. This choice was further strengthened by the community's grassroots and not-for-profit setup, which, unlike so many other professional networks or communities, relies entirely on the commitment and dedication of its members, independent of any company-mediated resources. The community thus offered a valuable opportunity to advance our understanding of how participation in inter-organizational communities matters for the employee activists themselves, beyond any corporate mandate.

Data collection

The first author joined the community and its online platform as a participant observer and by attending their events from March 2021 until January 2023. The researcher's interest in the community had been sparked when reading publicly available data published by members of the community, such as entries on social media, podcasts, and magazine articles. Joining the community, they were initially interested in understanding how the community was organized and how its members pushed collectively for different work practices in their companies. The first author followed and analyzed the entries in the online platform and participated in the main community events, during which members come together in larger groups of 50-70 participants and which took place once or twice a year.

Already in the initial phase of data collection, we noticed that community practices seemed disconnected from the community's publicly espoused aspirations and that the community struggled to mobilize collective change activities. The first author began interviewing members and learned that this struggle had its origins in the very

setup of the community: Individuals struggled to reconcile tensions between the alternative ideals that they nurtured in the community and the constraints of their corporate roles. To better understand these tensions, we proceeded by conducting further in-depth interviews. The first author started by interviewing members who were central to the community, including founding members, and who were very active on the online platform and during events.

Table 1: Overview of interviews

Pseudonym	Position	Industry[1]
Jana	Inhouse consulting	Utilities, logistics & telecommunications
Claudia	Inhouse consulting	Professional & financial services
Frank	Inhouse consulting	Technology
Philip	IT project management	Professional & financial services
Peter	Inhouse coach	Professional & financial services
Inka	Learning and development	Utilities and logistics
Sebastian	Learning and development	IT/communications
Niels	Project management	Technology
Hans	Process engineering	Automotive
David	Self-employed	Professional & financial services
Christian	Operations management	Technology
Stefanie	Learning and development	Automotive
Oliver	Strategic project management	Utilities, logistics & telecommunications
Simon	Organizational development	Technology
Jennifer	Organizational development	Automotive

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[1] Please note that we aggregated some of the industries for the sake of anonymity.

They then identified additional interviewees by participating in events and the online platform, selecting people who had been members for at least two years and who actively contributed beyond the main events, for example by organizing initiatives in sub-groups or joining regular small-group activities. Choosing fairly active members was important since it became clear early on that of the more than 200 members, only a part was regularly attending and contributing to the community's development and initiatives. Hence, such purposive sampling was important to capture those community members who can be considered employee activists. Table 1 displays an overview of the interviewees.

The interviews followed a semi-structured interview guide that the authors developed together based on the initial interviews. The interviews aimed at gaining further insights into interviewees' role(s) and experiences of their employee activism in their workplace and their community participation – and how these experiences had developed interdependently over time. They were conducted in German, lasted between 60 and 90 minutes, and were recorded and subsequently transcribed. Further, we kept meticulous notes of our observations during participation in events throughout the study, in particular noting expressions of individual experiences and how social dynamics unfolded within the group. Table 2 provides an overview of the data.

Table 2: Overview of data

Type of data	Description
Publicly available data	Podcasts (157min), Videos (48min), LinkedIn posts (12 pages), Website
Participant observation	4,5 days of events (3 days online, 1,5 days in person), ca. 32h (field notes, photos and screenshots of (digital) artifacts such as agendas)
Posts from internal online platform	Ca. 190 pages covering a period from November 2020 to January 2023
Interviews with community members	15 recorded and transcribed, 60-90min per interview

Data analysis

We followed an interpretive and inductive approach in analyzing the data. Both authors read through interview transcripts and other data and annotated them independently. We then discussed our empirical observations in constant comparison to emerging theoretical ideas. We noticed that some of the struggles and tension already observed during the ongoing data collection also stood out when we engaged with the data more analytically: The employee activists struggled with the tensions between their transformative aspirations and the demands of their corporate role. Moreover, the tensions pertaining to the transformative experiences in the community versus the constraints of corporate reality started to surface from early on.

We decided to focus our data analysis on these tensions and proceeded to a more structured mode of coding to tease out the tensions that people experienced relating to their employee activist aspirations but also between the community experience and the return to the corporate setting. As a next step, we focused our coding on the community experience and how this experience mattered for employee activists when returning to their corporate roles. Discussing the coded sections in several iterations, we summarized them into 23 first-order concepts which we sorted into three sets of second-order concepts (seven in total). Intending to understand the dynamic relationships between the second-order themes, we distilled three aggregate dimensions (Gioia et al., 2013). For instance, the first-order concept "experimenting with alternatives" forms part of the second-order theme "cultivating collective momentum", which, together with the second-order theme "experiencing empathic connections" forms the aggregate dimension "transformative experience of collectivity" (see data structure in Figure 1).

Figure 1: Data Structure

1st Order Concepts

2nd Order Themes

Aggregate Dimensions

- Using work for greater good
- Using one's talents in a meaningful way
- Need to act in accordance with one's personal values

→ Longing for meaningful work

- Pride in company
- Wanting to feel 'at home' in 'parent organization'

→ Wanting to belong in company

→ Aspirational change agency

- Harnessing the power of interorganizational collaboration
- Experimenting with alternatives
- Opening-up imaginaries of what is possible

→ Cultivating collective momentum

- Connecting to each other as humans
- Showing one's vulnerabilities
- Feeling 'at home'

→ Experiencing empathic connections

→ Transformative experience of collectivity

- Exchanging knowledge and experiences
- The grass is not greener on the other side
- Recharging in a safe space
- Being able to keep going in the hamster wheel

→ Agency as resilience

- Corporate role no longer sole frame of reference
- Feeling confident to confront tensions
- Daring to show authentic self at work
- Using community backup as leverage

→ Agency as emancipation

- My job no longer defines me
- Community opens up new avenues
- Community gives people the strength to leave corporate job.
- Maximize their impact by working outside corporate world

→ Agency as liberation

→ Reconceived sense of change agency

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Findings

In what follows, we detail the tensions around their aspirations that employee activists encounter daily; how the community provides an antithetical space to such tensions; and ultimately how the juxtaposition of their experiences in the community and their corporate lives can work like a prism for the employee activists' experience of change agency. Specifically, we identify three ways in which the employee activists reconceive their change agency: as resilience, as emancipation, and as liberation.

Employee activists' aspirational conceptions of change agency

The employee activists we encountered during our study had different backgrounds and motivations for joining the community, but they shared aspirational conceptions of their change agency. We summarize these aspirations as "longing for meaningful work" and a "wanting to belong in company".

Longing for meaningful work. Many community members, also before joining the community, expressed that what made their work meaningful was the pursuit of a social purpose beyond their corporate mandate and to "question the system" (quote from chat). Or, as another interviewee put it: "I am doing [this] because I want to make a difference for Germany" (Frank). Many of them shared a belief in the power of people to transform society for the better by promoting work practices that enable more participation and democracy in the workplace and help to harness the power and resources of corporations to transform the way we work on a societal level, as Simon explained: "make the world better every day [sic]. That's the goal … I have relatively good access to the organization. And that I want to position the organization in *such* a way that it is more effective in accomplishing this goal."

Work, from the participants' perspectives, was not only meant to advance their careers but they sought to spend their time at work – a large part of many people's lifetimes – using their talents in meaningful ways as well as enabling others to do so, too: "What motivates me, also based on my own experience, is to enable people to do something meaningful in a holistic sense … What can we contribute beyond what is expected in a job description?" (Niels) As demonstrated in this quote, many members share the belief that they can advance their societal purpose through their work. Indeed, many emphasized that they felt obliged to act on their aspirations as a matter of personal integrity:

> That I stand by what I do, that I can do it with a good feeling, with a good feeling, yes, … that I can say 'what I'm doing is appropriate, it is consistent, it is right, I can stay true to myself'. (Inka)

As this quote illustrates, the aspiration to drive change and their longing for meaningful work was tied to members' sense of self and their place in the world.

In practice, however, many employee activists struggled in their corporate roles. Many of those who joined the community worked to some extent with organizational change in their corporate roles, and those corporate roles ranged from "compliance and CSR", "quality management", and "organizational development and agile coaching" to "process development" (posts on online platform). Our data show, however, that many members found themselves preoccupied with fulfilling their roles and tasks given to them by management, and they often found themselves unable to find time and energy to pursue the causes important to them. Others explained that they could not integrate their aspirations within their roles at all. As Hans describes, "[My] main responsibility is laboratory analysis. And I have an agreement with my boss that I get some freedom to learn more about all the other things that are important to me." Longing for meaningful work, many employee activists joined the community in the hope to foster their ability to pursue their social purpose in their companies.

Wanting to belong in their company. The employee activists in the community saw their company not only as a lever for societal change but also as part of their social identity. As one person introduced herself in the community chat on the online platform: "During the pandemic, it became clear to me again and again what a great company I work for. We produce … everything you need in a hospital, improving the health of people all over the world." This quote is illustrative of the pride that many participants expressed in their company. Participants' identification with their companies was also evident in that they commonly referred to their companies as "mother," "parent," or "home organization" (quotes from the online platform). There was a shared understanding that participants would return to their "home port," where they thereby indicated they belonged.

Yet in practice participants' relations with their companies were often strained, especially when they vigorously pursued their social purpose. As Stefanie put it: "That is, I believe, the greatest tension for me at this point: to stay true to myself but to still fit in." As in this quote, many members expressed that they struggled to experience a sense of belonging in their work lives, feeling rather "like a penguin in the desert" (Claudia). Some even experienced that they were alienated and ridiculed by colleagues when they

were more upfront about their transformative ideas. As Peter described: "they lost a piece of home in their organization, because some of them are even being marginalized. Some say, 'they are nuts!' or 'that's a no-go!'." Despite wanting to belong to their companies, many participants thus experienced that they did not fit in.

These tensions between their aspired change agency and the reality of their workplaces, however big or small, motivated the employee activists to seek out the community in the hope to meet like-minded people who would understand them and support them in dealing with the practical and emotional challenges that advocating for change in a highly institutionalized setting entailed, as Sebastian explained:

> I'm pretty sure that I'm not the only one who is part of a corporate setting and who is faced with a lot of resistance and many challenges and tensions. And [in the community] we meet people with the same tensions and challenges.

In what follows, we unfold how people experience such connections with like-minded others as they participate in the community.

Community participation as transformative experience of collective momentum and empathic connections

Mirroring members' aspirational change agency, the community was founded, as a founding member put it:

> …deliberately in [the context of] established corporations, because I think – and many others in the community do, too – that we will, at least in Germany, need corporations in the future…knowing full well what is and isn't possible in a corporate context. (Jana)

The aspiration to use corporations as levers for change was a shared understanding that brought the founding members together as a community in the first place. As one member put it, "our purpose [in this community] has always been to use the power of our network, because we assume that corporations, in particular, have power in the world of work." (Philip). Indeed, the main idea was that the community would strengthen efforts to change companies from within and to "combine the potential of our parent organizations in collaboration" (post in chat).

The community's declared motto on its website was to "be the change", which features prominently on its landing page and attracts many members. Many joined because they expected to "share experiences and learn from each other" (post on online platform), to find a "shared learning space", as one interviewee calls it, and "to work

together on challenges, maybe also competencies…to acquire competencies that we all deem increasingly relevant." (Niels). Others joined looking for emotional support, as one member puts it: "I was very much hoping to find something like an energy station. Or to find like-minded people and no longer feel so alone. That was my hope." (Christian) Our analysis shows that especially the experience within the community (at meetups and events) meets and exceeds such hopes: Members experience the community as transformative because members cultivate collective momentum and empathic human connections.

Cultivating collective momentum. Members who joined and stayed in the community throughout our study emphasized how much they valued the exchange with like-minded others. As one interviewee put it, she appreciates how the community enables her "to exchange with other people on a topic that preoccupies you, that bothers you, that you can't seem to make progress on, and thereby get new ideas" (Inka). Their shared aspiration, "to promote a self-determined and meaningful world of work" (community website), enabled such exchanges because people had a common ground to build on and did not feel that they had as much explaining to do but could instead address the issues they want to discuss right on, as Hans described:

> There is so much mutual support. No matter the question I throw into the room, I get answers, always. There is no silo-thinking – you have a question, and someone has an answer or even offers you a solution. Just like that. No tactics, no financial gain, or something like that. (Hans)

As this quote shows, open exchange among employees of different corporations without hidden agendas was a new experience for him. Similarly, another member even hinted at the fact that he was somewhat stuck in his bubble before becoming a community member, partly because it was frowned upon as an employee to seek exchange with employees from other corporations:

> To meet people from other companies. Because up until then, we were really in our own [company's] bubble. So, you were only allowed to, you only spoke with suppliers and other business partners. And this was an opportunity to meet people from [other companies]. (Sebastian)

Meeting all these other individuals who were interested in the same topic offered new experiences of exchanging with like-minded people that many had hoped for when joining the community.

Such collective momentum was also cultivated in practical experimentation with new ideas and processes. Experimentation with new practices and ideas featured heavily

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in the regular community meetups. Even the agenda for such meetups was set experimentally, in a so-called barcamp style, as the first author could observe, meaning that any member could offer a session and the others could spontaneously decide which sessions to attend. The topics could range from "How to measure team resilience" or "The performance management system is broken" to topics beyond corporate life such as "autocracy and power and loss of control in times of war in Europe" or "youth work and education". Members also used the very planning of community events to run such experiments. For instance, during the pandemic, a group of volunteers designed a very elaborate online experience for a day-long meetup:

> I'm quite impressed by the whole online setup of the meetup. They use this very elaborate tool where they build different virtual rooms for the event (there is a plenary space called 'arena' where everyone 'sits down' upon arrival and posts a photo and sometimes a fact about themselves or the topics they are interested in talking about. There is an open space, a lounge, pinboards where people post ideas et cetera. (Fieldnote, March 2021).

These experiments offered members a sense of progress on their aspirations in the here and now and were important, especially in light of the barriers that people experience in their corporate lives. As one interviewee put it, "we notice the barriers, right? We're not finding sponsors. And if we join forces, then we're stronger. That was the idea." (Frank) As this quote illustrates, members sought out the community because their efforts in their companies were frustrated. By participating in the community, members cope with their frustrations by cultivating a sense of collective momentum:

> What was so fascinating to me, there is a cross-company network about a topic that is on all our minds, so not everyone reinvents the wheel, but big corporations join forces – or people who work for big corporations – to solve or address a problem or a challenge, that all of us face together. (Inka)

In addition to that, members can experience pride in the results of the community, where a sense of achievement can sometimes be lacking in the home organization:

> And in the community, ultimately, I co-created something…and it was important to me to see what develops from it. And I think the motivation behind it was also a little bit, something like, a sense of pride in my work. Something that apparently was missing in my job. (Claudia)

As this shows, the community to some extent seems to foster a shared sense of collective momentum. For one, because putting a shared aspiration into practice offered them novel experiences and imaginaries of what might be possible. Furthermore, the very engagement in the active community contributed to an experience of collective achievement that was often absent in their home organizations.

Empathic connections among individuals. Although many were seeking out the community in search of practical support, we also find that participants perceived the community as transformative not only based on knowledge exchange but through connecting empathically with others. Even though the members had very diverse professional backgrounds and worked for different organizations, many described a feeling of strong connection that was noticeable right from the start:

> We were and we are very diverse when it comes to our backgrounds, but … I stepped into that room and immediately felt that they are not foreigners, but that we know each other. You almost wanted to hug each other immediately, you know? (Inka)

This sense of connection was a sentiment often expressed after community meetups:

> It is so nice to see friendly faces and to share what's on our minds. It felt like such a nice and nurturing connection that developed, a sense of connection after just a few minutes. (Chat post after an online meetup)

Our data show that even those who described joining the community for instrumental reasons and who were not necessarily searching for human connection in the first place felt "at home" and "secure" (video log after meetup) in the community.

Indeed, a shared yearning for empathic connection was core to what brought people together in this community, and members actively cultivated this experience in the community over time:

> So, what I really like is the space that we have created in [the community]. It's usually a very, very appreciative, open, trusting, and safe space. That's what we always wanted to create – in our organizations, too – and I can see myself, but I also see others, how they can rise, can open up in these spaces. Maybe because they or we…don't experience that in our everyday environment regularly. So much appreciation, so much openness, so much diversity, and yet a lot of constructive dialogue, a lot of humanity. (Philip)

Many activities were set up so that members could relate to one another empathically and in a way that would encourage them to show their vulnerabilities, as the first author observed while participating in events. There, they experienced activities such as "collective meditation" or practicing "prolonged eye contact" (fieldnote, June 2022) to foster connection at a deeper level. Conversations often ran deep very quickly, and people openly shared their struggles:

> We start the day in small breakout groups … Immediately a very fluid and deep conversation develops in the small group. We talk about how we feel insecure after Covid when events take place offline again and we feel our bodies at work again or moving in space. … At the end of this round, one of our group says, "I have felt deep trust here in the group …", another person says, "I have experienced a really beautiful way of being listened to here". (Fieldnote, November 2021)

This openness to show one's vulnerabilities also manifested in the formation of a sub-group that meets online weekly, as one member explained:

> There was this really close proximity that developed, where you would open up so much and say things or talk about things and reveal things – you wouldn't normally do that. (Inka)

As this quote shows, members experienced that they could leave their corporate persona behind, revealing things that usually remain hidden in a work context. Similarly, one person posted in the chat after one of the online community meetups that the way they open up to each other "immediately made me tear up again. I don't have that back in the corporation … we are without masks here. Safe."

These experiences of belonging and feeling safe in the community, also indicated in the previous quote, could be somewhat in contrast to how people experienced their relations with colleagues in their companies. As one member describes their experience:

> Here they meet like-minded people and that makes you feel good – you hear that a lot in the community, "we don't want to go back [to corporate life]", so it gives you strength and validation, it is home. (Peter)

These quotes show that by providing a shared space of authentic human connection which makes members feel at home, and that some prefer their new home to their old home, that is, their workplace. Thus, rather than alleviating the alienation people experience in their companies, the community experience could also alienate them further, as another member reflected in the chat after one of the meetups: "Back in our companies, we are faced with a reality that doesn't fit us (anymore) … We don't fit in anymore. And that is why we don't resonate anymore. Therefore, we can't find our 'home', the context in which we can be effective."

Reconceived sense of agency – From collective experience to dispersed collectivity

As we set out to explore how participation in the community matters for employee activists, we expected to find that being part of a community would enable employee activists to promote their change efforts collectively. While the community did cultivate a sense of collective momentum, members did not mobilize action together to the extent they had hoped for: "[the community] does not live up to its potential at all. We could do so much more. We could use a systemic approach to make change happen everywhere at once." (Sebastian) Claudia suspected that the heterogenous corporate realities made it difficult to push for change together: "[The community members] have

totally different regimes in their heads…to even reconcile those when working in the community! … Such diverse perspectives. And such diverse experiences."

Rather, they returned to their many different companies and focused their efforts on driving change there. One main problem was, however, that people's community experiences were somewhat in contrast with their corporate reality, and they thus felt that it was difficult to take especially some of the more experimental learnings with them into their daily lives. Members expressed that many of the community activities that made their participation so valuable would be completely impossible to implement in their companies, as the first author's field notes document:

> During the online session, some members write in the chat, making fun of how they would NEVER be able to try some of the things and tools discussed or tried out in the community in their corporate role. One person writes: 'You are crazy! We are not allowed to use any of that here … Best regards from reality'. (Fieldnote, March 2021)

David experienced this firsthand when he tried to implement some of the things he had learned in the community in the organization he worked for: "They would tell me, like 'now is not a good time'. And that of course is super hard, when your experience all those valuable approaches and cool ideas and then you bring it into the organization and it's rejected." Thus, participation in the community could also distill a perception of restricted impact and what is *not* possible. Indeed, some members even described efforts to nurture grassroots momentum as dangerous or irresponsible because ultimately, there is a price to be paid:

> Well... I blame myself, too, and I find it irresponsible today to start such initiatives, such bottom-up initiatives. I've seen many colleagues who were pushed out of [the company] because they were suddenly odd characters. (Frank)

In exchange with a community hoping to change the rules, members gain a better understanding of the potential consequences of breaking them; and they may consequently choose to "play the game" instead of pushing for change to the desired extent.

Yet despite sometimes missing direct applicability of experiences to their daily lives, and despite some perceived dangers of being marked as "odd characters" in their home organizations, we found that community participation was overall still very valuable for employee activists' sense of collectivity even as they dispersed back into their companies. Participation in the community thereby constituted a prism through which people reconceived not only the tensions around their own conception of purpose inherent in employee activism but also what they considered viable, desirable, and

sustainable courses of action for themselves to undertake when back in corporate reality. As Jennifer put it in our interview: "The community expands my solution space". Specifically, we found three main ways in which activists reconceived their sense of agency: as resilience, as emancipation, and as liberation.

Agency-as-resilience: Staying in the corporate game. Agency experienced as resilience enables members to keep going in the "hamster wheel" as they experience new strength to sustain their activism and deal with the challenging circumstances they face in their corporate roles. This dimension is characterized by getting better at and/or being able to keep navigating tensions but still being fully committed to their role and accepting that they must color within the lines, as one member describes:

> Knowing what needs to be done and finding the best way to approach it … I wasn't always successful with that in the past and it still isn't easy today. (Niels)

The community plays an important role in helping its members to build and maintain their individual resilience. Members openly share their struggles within the community, which enables them to gain perspective on their own company. Some can see that the grass is not necessarily greener on the other side: "It helped me to put my own organization into perspective. You often hear things like: 'Everything is super difficult for us. Other companies are doing much better.' And if you hear directly from other companies, you notice that they struggle too." (Simon) Through comparison with similar experiences in other organizations, some people put their own struggles in perspective, thereby fostering a renewed commitment to their company.

Furthermore, community members were able to face their constraints and keep playing the game because they experienced that the community allows them to recharge. As one member explained, such recharging was often much needed:

> As you can imagine, [the work I do] requires huge amounts of self-reflection but also energy. … And I can sense that occasionally I need regeneration. And I cannot get that within my team, because if I talk to my colleagues, I know what will happen: everyone gets stuck in some form of self-pity loop, like 'oh my god, oh my god, oh my god.' (Stefanie)

The community provides a way to recharge among like-minded people: "and then we refuel. That's absolutely how I feel when I attend the events." (Sebastian). Or, as someone wrote in the chat after an event, they were done "recharging [their] batteries".

Yet, many also described that they recharged in the community just to be depleted again in their company, leading to a circle of recharging and depleting:

> The community backs me up. I have experienced that again and again, that sometimes you're in despair because you fail to push for change, because of some higher-ups or just the general conditions. That's tedious and sometimes you lose faith even though you know deep down that it is the right path. And the community supports me to keep going and not give up (Hans)

Other members echoed this, saying that the community experience helped them "to refuel and then go back into the not always easy corporate setting" (Niels) and to "keep at it." (Claudia) As Frank put it, it helps to "stay *in* the game, you could say", albeit, as this quote also indicates, still playing by corporate rules. Community participation thus allowed members to sustain their change effort despite adverse conditions in their companies.

Agency-as-emancipation: Twisting the rules of the corporate game. Another effect of the community experience on the members points in a slightly different direction. Agency experienced as emancipation, as we call it, enabled employee activists to enact and experiment with alternative behaviors, thus moving beyond the tensions inherent in employee activism and instead – when needed – disobeying or subverting the norms and expectations that dominate corporate reality. We found that, inspired by community exchange, some employee activists proactively engage with tensions as they experiment with or even try to change the rules of the corporate game.

Some members experimented with bringing community activities into their companies:

> I was fascinated by the laughter yoga we tried out at a meetup, so I brought it with me to the company. And we said, let's just try it. … And to find that, yes, maybe this creates a big tension for the organization. But then we said in the team, ok let's face that tension head-on and work with it. (Christian)

Community members were aware that such experimental activities (such as laughter yoga) would break with what was commonly expected in their company and would hence cause tension. Rather than avoiding it, however, activists were sometimes willing to create and confront such tension in an effort to stimulate change. Similarly, some members worked towards cultivating more meaningful relations with their colleagues by dropping, as one interviewee describes it, their corporate masks:

> In my experience, the community honestly is mask-free. In the corporate context, people sometimes check out which role you have. And then, depending on the role, you cannot speak freely and say what you really think or feel. And for some time now, I very consciously don't do that anymore, even in meetings with the board. There is no haze over what I say anymore. I say what I think and what I feel. Like in the community. (Hans)

Many of our interviewees echoed the new sense of emancipation in their relations illustrated by this quote.

Community participation crucially enabled such emancipation. First, members brought the community spirit with them as they dispersed into their companies:

> A colleague from another department and me … we came back from a meetup and brought this ENERGY back to the office. And that was awesome because it was so disconcerting for everyone [in the office]. After all, they weren't used to that at all. (Stefanie)

Secondly, members used the knowledge of other ways of organizing as leverage to push for change in their companies:

> They [the management] can't imagine it…So I thought, okay, if we showed them 'look, [this company is already doing it] and [that company] is doing it…then we'd have some leverage to say 'why aren't we doing it? We have the same problems, after all.'

As this quote illustrates, the community offered an external point of reference that they could mobilize in their efforts. Overall, our interviewees described that the community gave them the confidence to confront their company's practices and their colleagues and managers:

> I have allies in the community. And if people question why I do certain things, why I am the way I am, why I want to do certain things now, then I always feel like I have the community and the people behind me. … So, it strengthens me. To bring new ideas into my organization. (Hans)

Several of our interviewees echoed this sentiment that they were able to twist the rule of the corporate game because the community backed them up.

Agency-as-liberation: Playing one's own game. In some instances, participation in the community had even more far-reaching significance. Agency experienced as liberation entails that activists feel empowered to explore alternative positions and ways in which they can drive change, including the possibility to leave their corporate jobs and drive change as outsiders. We found that community participation lessened some members' emotional attachment to their company and thereby enabled them to venture toward what they hoped were greener pastures. Indeed, some members experienced that the grass was truly greener on the other side:

> To say I want to make an impact in my [corporate] context but I also notice there is a world out there where things seem to be working, just not at my home, not in my corporate context. That can give you strength on the one hand, because everyone else is dealing with similar issues but maybe it's even more dramatic at my home and that can be frustrating in the worst case, you know? (Inka)

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One member described how the community made him aware of new opportunities,

> [t]hat weren't so obvious before…either something would have had to be extremely bad, or I would have had to desperately want to take the next step in my career and work towards it. But that wasn't the case, so it was a gift to notice, hey, this could also be an option for you. (Sebastian)

Community participation enabled people to see options that they had not previously considered, and this widened perspective enabled liberating thoughts of new pathways.

Such new opportunities were especially attractive for activists who questioned the extent to which they were in a position to effectuate change effectively, as one member explained: "We notice that many of us…then rather say, I can't be effective here [in the corporate context] or the wheel I have to turn is so huge and it's so frustrating…that many then tend to give up and say I'd rather get out of this and try to be effective somewhere else." (Philip) Through their exchange with others, some realized that they could indeed be more effective elsewhere, and work in a more constructive environment, as another member confirmed:

> Then you can put as much of your energy into it, it will always fizzle out. And that is, I think, a realization I took away from the community. If I want to use my energy not only to a limited extent in a meaningful way but beyond, then I need to take another path. Because there are companies and people and clients who do want change. And who are willing to make space for it. (David)

For some, liberation also consisted in becoming more attentive to their well-being:

> This desire to push for change … beyond [organizational] boundaries, as we do in the community. And to then notice how quickly you're pushed back into silos in the company – that does hurt. So, I believe that some just cannot take that anymore and therefore go their own way. (Hans)

As these quotes show, multiple members were tempted to leave their company, where they faced discouraging setbacks, in favor of assuming different jobs where their efforts would be valued – and this change was also perceived in the rest of the community.

Indeed, one emerging concern for the community was that several members left their companies and instead became independent consultants.

> So, you mean the community played a part in them starting their own companies? (Interviewer)

> Yes, in a positive way. Because they became aware of their skills and gained the confidence to say, I can achieve more if I can provide my experience to more organizations and to those who actually want it instead of being met with rejection all the time. (Peter)

As consultants rather than employees, people felt that they were free to only work for companies that would want their services. This development also posed problems for the community, since external consultants were explicitly excluded from the target group to prevent the community from becoming a "marketplace for consulting services" (internal presentation, 2021). After many discussions, however, it became customary that those who joined when still in corporate roles could stay community members when starting their own companies.

While, then, a group of community members moved into new positions or even gained the motivation to become external consultants to work more self-determinedly, some also stayed in their firms, but no longer had the same attachment to their company, and found in the community a substitute for their disillusioned change efforts that could provide them with "a sense of pride that was missing in my job" (Claudia). Regardless of whether members stayed in or left their companies, their participation in the community enabled them to consider both options as viable choices to make, thereby reminding people that they could decide which game to play.

Concluding discussion – communities as a source of dispersed collectivity?

In this paper, we set out to advance our understanding of how participation in inter-organizational communities of like-minded people matters for employee activists and the causes they seek to advance. Our study shows that the community does not mobilize strategic action targeted at their members' companies. Instead, employee activists cultivate collective momentum and empathic connections, which constitute transformative experiences of collectivity for the employee activists. Specifically, these experiences are transformative because they maintain a sense of collectivity even as they disperse into their companies, thereby enabling them to reconceive their change agency. In what follows, we develop the notion of *dispersed collectivity* and explain how our study advances our understanding of employee activism.

Our approach to this study was inspired by Creed et al.'s (2022) observation that community participation can offer a transformative experience and shape how a person views their change agency and efforts. Our study shows that members indeed experienced their community participation as transformative in that the collective momentum and empathic connections that they cultivated in the community shaped them even as they dispersed and individually pursued their daily lives outside the community context. That is, the employee activists were able to draw on the tangible

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strides as well as the sense of individual significance experienced within the community upon their return to their respective companies. Dispersed collectivity accordingly endows employee activists with a sense of meaningfulness and a feeling of belonging that can be carried across contexts.

Our study reiterates that even though the community helps them to develop new meanings and experiment with alternatives (Villesèche et al., 2022), employee activists cannot directly translate community practices and resources into their change efforts at work (see Petrucci, 2020). The community thus does not directly help them to enact the change agency they originally aspired to. Nonetheless, we have shown that dispersed collectivity enabled people to reconceive the repertoire of agentic experiences available to them in three main ways: as resilience, as emancipation, and as liberation. These three conceptions constitute a repertoire and are thus not mutually exclusive, although some may be more salient for some than for others. Because this repertoire entails an altered understanding of their own place in driving societal change, employee activists can cope and work with these tensions inherent in employee activism in ways that they experience as more agentic. The community experience thus allows them to sustain their activism in ways meaningful to them and as part of a collective albeit distributed change effort. Drawing attention to the significance of dispersed collectivity, our study contributes to the literature on employee activism in two main ways.

First, we contribute to the literature by introducing the notion of dispersed collectivity to advance our understanding of how communities matter for employee activism. Previous literature has emphasized the importance of external ties and resources for employee activists to pursue change in their companies (Buchter, 2021; DeJordy, 2020; Briscoe & Gupta, 2016). We expected the community to be especially beneficial in mobilizing strategic action similar to social movements, such as by pursuing social movement tactics (Soule, 2009, Briscoe & Safford, 2008) or even generating a "bureaucratic insurgency" (Zald and Berger 1978). Our study, in contrast, shows that the significance of the community was different: despite the collective momentum for sometimes insurgent ideas and experiments *within* the community, this momentum did not generate a movement for more radical change across companies. Rather, our study suggests that communities matter because they can cultivate transformative experiences of collectivity – and play important roles in realizing the transformational potential of employee activism by strengthening and sustaining employee activism even when a collective push for change is not developed.

While one may be tempted to consider the absence of strategic action a limitation, the employee activists in our study found such collective action not desirable or viable at all costs. Notably, their companies remained the main points of reference for many of the employee activists and the contexts in which they wanted to push for change. Because many employee activists were so invested in contributing to positive change from within their companies, they had to act differently than social movements to sustain their activism over time. Instead of mobilizing collective action, the employee activists in our study found that they could best advance their causes by sustaining their efforts in dispersed ways. Our study thus alerts us to the importance of cautiously evaluating to what extent a social movement approach can be applied in the context of employee activism.

Second, our study contributes to the literature by challenging common conceptions of change agency in the context of employee activism. An abundance of studies has now documented that employee activists who push for change vigorously face intense opposition that can be detrimental to their careers, their mental health, and eventually their causes (Carollo and Guerci, 2018; Decelles et al., 2020; Hafenbradl and Waeger, 2017; Kenny et al., 2020). As others have argued before us, changing a company from within may therefore require that activists settle on rather subtle activist tactics aimed at piecemeal change (Meyerson and Scully, 1995; Scully and Segal, 2002). Our study shows that employee activists can sustain their activism by relinquishing the heroic aspirations that define their own change agency. However, in doing so, they do not have to abandon their radical aspirations for change. Rather, by reconceiving their individual role within the bigger picture, they can more agentically walk the tightrope between their radical aspirations and the constraints of the corporate setting. As scholars, we also need to respect and look for these more subtle manifestations of agency.

Boundary conditions and outlook to further research

Our study has two important boundary conditions which open up avenues for further research. First, the inter-organizational community we studied consists of people whose interest in more autonomous and meaningful modes of work is tightly linked to an interest in and openness for new and alternative modes of organizing. This circumstance is likely to have influenced how they experienced and engaged in the community, especially with the more experimental and prefigurative activities. These elements were crucial in generating collective momentum, thereby possibly rendering the

transformative experience more salient. Employee activist communities focusing on issues that are not as closely linked to ideas of alternative and prefigurative organizing or do not lend themselves to such experimentation may struggle in building a sense of collective momentum through these elements. Further research is needed to understand how and to what extent experimentation is needed to build collective momentum in communities of employee activists.

Second, our call to reappreciate piecemeal change backed up through a sense of dispersed collectivity is, of course, very topic and context-specific. It is possible that, depending on the topic or context, either dispersed collectivity and piecemeal change *or* social movement and radical change may be the best way forward. This could be affected, for instance, by the degree of societal attention and awareness of a topic or by the extent to which it is possible to formulate tangible and attainable goals. Moreover, which type of employee activism is more likely to emerge and be perceived as viable could also depend on whether activists are working *for* a cause (i.e. pushing for change they would consider positive) or *against* a cause (i.e. trying to hold firms accountable for wrongdoing). Our findings indicate that in the case of working *for* change considered positive, employee activists may be more invested in the company they work for and therefore opt for collaborative instead of antagonistic forms of activism. More research is needed, however, to understand these dynamics.

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