

## **“Turning practice into an academic contribution“**

*Comment by Julia Balogun*

I want to start by saying how delighted I am to be here as discussant for Jean, whom I value as a collaborator and a friend, having worked with her now since 2007. I admire Jean for her qualities as an academic but also for the significant impact she has had through her work, a point to which I will return. Although I have only worked with Jean since 2007 I feel I have known her and her work for much longer. I don't think I have ever confessed to Jean the extent to which I was a Bartunek “groupie” in my early years at academy conferences. Back in the 1990s she was often involved in PDWs and symposia on change, action research and insider-outsider research and, of course, was and still is an internationally renowned qualitative researcher. I went to virtually all of Jean's sessions, loitering around at the back, seeing her research as influential on my own on strategic change and sensemaking, but also sharing an interest in research which involved close working with practitioners. However, I never dared to approach Jean seeing her as someone elevated way above my level. I rather regretted that as once I did approach her suggesting that we might have some mutual interests, I found as anyone who works with Jean does, a very warm and caring individual with little regard for status, very willing to engage with those who share her interests and generous with her time for all. In addition, she is great fun to work with ...

As one of the people I contact about Jean and her work commented .... She is inspirational to work with as “[She is a very well-rounded scholar who attacks issues theoretically, qualitatively, quantitatively, and reflexively](#)”

If you read Jean's piece about her scholarly career in *Organization Studies* in 2006, you will see that her interest in change stemmed from her own experiences, and that this led to collaborations around OD and action research, which are of course closely linked. From this early work she discovered she says, that she liked studying "real organizations." Indeed she has a section labelled "an experience that affected later theorizing." The same was true for me – I wanted to understand the challenges I saw practitioners experience in my time as a consultant (and didn't think consultants had an answer for). In Jean's case her experiences included work which underpinned what must be her most cited piece in *ASQ* (certainly the most cited by me), based on consultancy work she was asked to do within her own order in the Catholic Church on a restructuring process. Indeed, for me, one of her enduring legacies is not her work on practice and relevance that I am about to move on to talk about, and that is the focus here, but her foundational work on change as a cognitive process, which through her notion of organizational interpretive schemes underpins much of the thinking on strategic change (what Jean might term second order change) as a process involving a cognitive reorientation around the organization, its goals / purposes and the shared assumptions that govern the way the members of an organization conceive of their organization. Much research on sensemaking and change, both in and outside of the SAP field, takes this notion as foundational. And this is one of the reasons she has been asked to be our distinguished speaker today. Her research has influenced much research in the SAP field.

All of Jean's early research, including that with Michael Moch, for example, involved working closely with practitioners, researching the practice of these practitioners and led her from action research into "Insider-Outsider" research, an approach designed to enable the collaborative building of knowledge by academics and practitioners. A hallmark feature of this approach is the primacy

it attaches to practitioners and their knowledge, and a respect for this knowledge, believing practitioners to know more than academics can about their context and their practice. And it has led Jean into many collaborations on practical relevance with the intent of improving relevance in academic work beyond “the sentence at the end of a paper”. Thus there is an attitudinal element to Jean’s approach to research and practitioners that is important.

As another of Jean’s collaborators in her work on relevance and practice, commented

- Jean has been deeply interested and involved in practice throughout her 40+ year academic career, beginning with her 1984 ASQ publication on the role of changing interpretive schemes in organizational restructuring
- She has also been long involved in fostering relationships of all types (e.g., 2000 AMJ on “The Importance of Relationships in Professional Life”), but especially those between practitioners and academics, as witnessed by her insider-outsider teams research with Meryl Reis Louis and her invited essay for the 50<sup>th</sup> anniversary issue of AMJ entitled “Academic-Practitioner Collaboration Need Not Require Joint or Relevant Research: Toward a Relational Scholarship of Integration”

What is important about the insider-outsider approach and Jean’s work, is not just the importance it attaches to collaborative working, but also that this never dilutes her focus on academic rigour and theoretically informed writing and contribution. I know all of this from my work with her. We share a belief in working from data to explore what is interesting and surprising in the contexts we research – and not just from our theoretical perspective but from that of the practitioners who have granted us access to study and research them and their worlds.

So what of Elizabeth Warren and practical relevance? She was indeed an influential academic. And I would like to say that using Elizabeth Warren as an example to focus our attention on the role academics can and should have in influencing practice is typical of Jean's thoughtful approach to scholarship – and I use the word scholarship deliberately because for what it implies beyond “research”, since Jean is more than an academic, she is a scholar. And Jean carries her scholarship into everything she does ... So today she has used EW powerfully to show how we can influence practice and should be committed to doing so by engaging more closely with issues of interest to practitioners. She also uses EW to illustrate the practices we need to engage in if we wish our research to influence practice. In fact, Jean homes in on framing as a device. Framing has, of course, long been recognized as a powerful form of influence in the SAP field and elsewhere, albeit not always in the SMO sense used by Sarah Kaplan, and picked up on by Jean to combine with more traditional framing mechanisms, such as metaphors. But as individuals who research the power of framing in the practitioners we study, we should be alert as Jean suggests to how we can use it ourselves.

But what of the other way around? How do we turn “practice, and a study of it, into an academic idea/contribution.” I confess, I have not like Jean developed thinking on this to the point that Jean has with her analysis of how to win a framing contest to influence practice. But this is another aspect of shared history for Jean and I, and an endeavour on which Jean and I worked closely in our recent Org Science piece on strategic change and sensemaking. We started with a surprising outcome of practice – namely the fact that a group of senior managers who had successfully led change and “made a difference” in their organization then chose to leave despite having other opportunities within the organization. Why? Was this a simple act of resistance to wider organization changes? It seemed more fundamental than this. And is also seemed significant

– what happens when senior managers such as these, that an organization wants to deliver change, leave? We started with the concept of what happens when even the bus conductors refuse to ride - sitting in one of the Boston College restaurants – and we still love that title even if in the end we weren't allowed to use it!! Adopting a SM perspective, we ended up developing the concepts of interpretive and relational contexts in which senior teams are embedded. We then revealed that there was a dynamic relationship between the relational and interpretive contexts in which senior management teams are embedded, their narrative evaluations of the wider organization change and what should be done locally, and the affect expressed in the evaluations, which in turn accounted for change outcomes. And that of course is what developing an academic contribution from a study of practice is about – finding the concepts and constructs that can provide an explanation for the outcomes whilst simultaneously adding to what we know about that phenomena, here change, from that theoretical perspective.

Although this is a recent example, there are many others in mine and Jean's work. In Jean's case her study of her religious order is certainly an example of this with the ASQ paper subsequently accounting for how the restructuring progressed in terms of cognitive and dialectic processes. It has also been something of a hallmark on my work on senior / mm sensemaking and change. My interest was very much on strategic change and strategic change practice, and getting access to study it. The focus on sensemaking came out of the data as a way to account for the different way different stakeholders in organizations engage with change efforts, and the outcomes this leads to. It was also influenced by the recognition that theories such as SM could encourage us academics, and therefore in turn practitioners, to think about strategic change in their organizations differently and intervene and practise in different ways. Back to Lewin and there is nothing as practical as a good theory. I also have to

be honest, I remain fascinated by executives and the things they find a challenge in their own organizations and in practice and how they overcome the challenges, and how the capability to overcome the challenges changes. Thus my start point is often empirical rather than theoretical. Indeed, I tell everyone that the one time I started theoretically, is the one piece I never managed to publish!!

There are two big challenges in turning research on practice into a theoretical contribution. The first some of my colleagues will find insulting, but I will face it up anyway. Unless you regularly spend time in organizations, unless you regularly engage with executives and their issues, it may be hard to understand why something is interesting or is an unusual outcome or even worthy of study. This can raise challenges at the review stage, particularly given the limited space one often has to unpack the empirics, as those starting theoretically may not be able to understand why what you are looking at is a challenge worth unpicking. Jean and I faced this challenge with the Org Sci paper. Surely these managers were simply resistant! This challenge of why something is interesting and relevant to study is one we face particularly in strategy as practice, and thus again we need to have skills in framing to account for why what we are doing is worthwhile and worthy of publication ... although this is also a challenge we are winning. (Evidenced by number of publications in top journals)

The second challenge, which relates to the framing, is then finding the right theoretical hook to engage others – and particularly those potentially less interested in “empirical” problems. There are often many different theories one could turn to for an explanation of how a practice or set of practices evolves to deliver particular outcomes in an organization, and everyone on hearing your data will see a different one. But which gives a contribution? And a contribution, to use Corley & Gioia’s 2011 terms, that gives a revelatory

contribution, and encourages us to see a phenomenon, eg change, in a different way? This can take us back in a circular way to the first challenge. But this is also a common problem for qualitative researchers. I do not have any easy answers other than to say this is what conferences and peers are about, as it is through presentation, discussion and peer review that we can hone in on the greatest contribution. I also do not think that the challenges present in developing research on practice that can also inform the problems managers face, into theoretical contributions, should discourage us from such research as without such research our ability to inform and influence practice is reduced.

But it is also this challenge that can divide those of us that work under the umbrella of SAP. Is SAP a theoretical or even an ontological perspective on strategy? If so, the empirical act will always be informed by a particular perspective on organisation and strategy. Or is it a more open ended empirical endeavour, where our concern is with strategic practice and the strategic practitioner, however we define that, with the dual intent to draw on practice based theories to account for how every day practice(s) constitute wider phenomena, such as an organization's strategy, or strategic change within an organisation. Our view on this will influence our own practice and the performativity of our scholarship.

Before I end, I would challenge Jean on one point. I am not sure that masters level management students learn that scholarly literature is irrelevant. I think we do translate it for them, but we also share it. I certainly do when I work with students through using research based case studies and getting them to analyse them in their own terms, and then relating their findings to more theoretical explanations that can then be used to help the students understand their organizations and issues in different ways. And we should do more of this. We

should not forget that one of the ways we influence practice the most is through our work in the classroom. (And this is a privilege and a responsibility)