An Ethnography Of Metaphor Usage In IS Projects: From Description To Domination.

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Abstract

This study presents the story of a three-year ethnographical field study, from December 2000 to December 2003, conducted at a North West based Management Consultancy. Throughout this period the organisation experienced accelerated growth from two sites with a workforce of twenty, to six sites with a workforce of forty-five. There were two major IS implementation projects conducted in that period resulting in pervasive organisational change for this growing workforce. A controlling mechanism by the organisation’s domineering Managing Director was the strategic ‘planting’ of two hegemonic metaphors, in the guise of ‘Tigger’ and ‘Eeyore’, two characters from the children’s storybook Winnie the Pooh. This was done to pre-empt and avert resistance behaviour. An objective of this study was to explore this use of metaphors to coerce certain users into compliance with management aims in IS projects. Existing studies tend not to report upon management’s explicit use of metaphor to control workforce behaviour in this manner. It could also be argued that this explicit use may have only been observed due to the rich insight of this longitudinal ethnographical study. Key features of the mechanism of metaphors ‘working’ in this case was the observation of a complex network of other underlying dominant metaphors in use in the organisation, enabling the submissive, unwavering, acceptance of the two hegemonic metaphors. A central contribution of this study is to highlight the power of mutually reinforcing metaphors when applied in a suitable context, so extending and reinforcing existing metaphor research within the IS field.
Introduction

Whilst much of the early Information Systems (IS) research was usually concerned with the escalation of technology capabilities (Noble 1995) more recently there has been a shift towards the development, use and impact of IS in business and organisational settings (Myers and Avison 2002). Information Systems could now be described as being ubiquitous, permeating organisations on both a micro, macro level, within both the private and the public sectors and on a national and global level (Myers and Avison 2002). IS is often associated with change whether this is the so called ‘radical’ and ‘dramatic’ impacts of Business Process Re-engineering (Hammer and Champy 1993; Sarker and Lee 1999) or the de-skilling of work using new technologies (Fincham 2006).

A key feature of organisational change is resistance by various social groups. However, it is important to point out that resistance can be viewed as positively or negatively depending upon the perspective taken. For example, managers might see resistance to change is incompatible with the organisational goals, yet resistance may also prevent ineffective technology being implemented (Newman 1989).

An intensive three-year ethnographical study was conducted at a Management Consultancy based in the North West of England. The ethnographical research process was conducted over a three-year period from the start of 2001 to the end of 2003. This was a period of extreme change as the organisation experienced accelerated expansion from a two-site organisation with a workforce of twenty to a UK geographical spread over six-sites with a workforce of up to forty-five and growing. IS investment was significant with the adoption of innovative technology in supporting the expanding community. A key feature of this study in this case, was the backdrop of the company, in particular, the strategic use of metaphors by the dominant Managing Director (MD). This research study aims to explore the use of metaphors in an IS project. The emphasis is upon the use of metaphors to coerce certain users into compliance with management aims for the project and to avert resistance.

A traditional structure has been adoption for this thesis, having introduced the two areas of literature, resistance and metaphors, by which this thesis is anchored and the research
methodology follows. The case data is then presented with a detailed account of the research domain introducing the organisation and its inhabitants. A rich picture is established in which to contextualise this research as the environment, working atmosphere and management approach is crucial in understanding how metaphors became an embedded dominating tool. The case analysis with a summary of the findings and contribution, followed by the conclusion closes this thesis. In the following section the research context is outlined regarding the significance areas of this research issue in terms of the theoretical framework and the methodological framework. The chapter concludes with a snapshot view of the remainder of this thesis.

1.1 Research Context

This section introduces the context of the research objectives discussed in Section 1.2. This thesis is anchored to how organisational actors reacted to and resisted the change induced by new technology. A further component is in the understanding of how senior management attempted to control and coerce the workforce's behaviour through the use of metaphors. This study had the potential to move towards a diverse number of alternative research concerns that equally would have made significant contributions to the IS field. It could be argued that the unlimited access and autonomy permitted by the organisation, coupled with the length of the study (three years) at a period of extreme IS related change presented numerous research opportunities. However observation at the early stages of this study was the novel use of the Tigger and Eeyore metaphors being used to label, the organisational actors. After initial exploration no other studies emerged in any discipline of this phenomenon. This factor initiated immediate interest to probe deeper. Nevertheless this study circles on reality. What really happened in one organisation when extreme IS related change occurred? The truth behind closed doors of how organisational actors, talked, didn't talk, argued, shouted, cried and reacted to being called Tigger or Eeyore. The story had to be told.
1.1.1 Defining the nebulous user

Who is the user? Who are the users? What contribution or responsibilities do users make to IS development? Defining the nebulous term the ‘user’ is problematic and often only afforded a cursory glance by academics and practitioners alike. There is a recognition that the user isn’t well defined in IS (Ferneley and Light 2007). The user is a prominent feature of this IS study and users are central element of IS research because both the social and technical aspects are looked at. Generally users have turned out not to be merely passive consumers of the technology but more than often to be actively involved throughout the design process. Whilst acknowledging this functioning role of users in the advancement, implementation and application of technologies expectations are therefore heightened for users to indirectly be involved in the political shaping of technologies (Rohracher, 2005). With this in mind, my study is concerned with the idea that organisational actors involved in technological change are not a homogeneous group but rather a group of users belonging to distinct groupings, each with their own organisational agendas, personal agendas and societal worldviews. In doing so, it is important to consider the heterogeneous user. Rohracher (2005:12) adds a further dimension by proposing that users is not homogenous social category either, but brings ‘to those processes a multiplicity of perspectives, ideas, social backgrounds and life histories, not to mention wants and needs’

In this thesis user resistance, user participation, user acceptance, user satisfaction, user involvement and user attitude are referred to and the ongoing debate, regarding the confusion and ambiguity of IS user terminology, is contributed to. But who is the user? The term user is ambiguous as there are several interact with IS in different ways and they are all called user, unfortunately (Friedman and Cornford 1989). There are possibly many reasons why the term ‘user’ is indistinct and means many things to many people. Users have organically evolved as key stakeholders in ISD as technological advancement progressed and users’ expectations became more sophisticated, a natural maturity that has not been dealt with. Cavaye (1995) suggests that the term user itself is a multifarious one and that when exploring any user activity constructs a range of users and their interactions can be identified. The author gives the examples of senior management that
will use the system output in a strategic manner, middle management that will use the system as panoptical management tool and lastly the employees who will use the system to in a day-to-day manner to fulfil their job roles (Cavaye 1995). This is of course the user interacting with a fully implemented IS. The second important user group that requires definition is the user group that interacts throughout the different stages of the life cycle of an Information System Development. Cavaye (1995) suggests that senior management has to agree to the development and finance of the ISD, middle management and employees have to contribute to the identification of requirements, design and testing activities interacting with the technology. This reasserts an assumption that the foremost role of the individual is to use a system. Given that the objective of the study is to explore the use of metaphor to coerce users into compliance with management aims for an IS project and to avert user resistance, it is important to include some reference to conceptualisation of the user. The emphasis throughout this thesis has been made on the resistance dimension of the user rather than the distinct user.

IS researchers, though this is not just distinct to this field, make a common assumption that users are a homogeneous group whose only purpose is with technology and their professional role fades into insignificance. Using an ethnographical research process for this study enabled a more spontaneous view of the user. An alternative insight is revealed of the heterogeneous user, one with emotions and personal opinions, from vendors, to decision makers, to incidental users and to users involved in the developmental process of customising ‘off-the-shelf’ applications. That said there are many different user guises involved when an organisation invests in a company wide IS implementation and this study introduces a diverse user group.

1.1.2 Research Traditions in User Resistance

Users of IS often respond in different ways to technological changes (Dickson and Simmons 1970), ranging from total rejection, through to a moderate rejection of some of its functionality (Markus 1983; Doolin 2004), demonstrated resistance (Hirschheim and Newman 1988), passive resistance (Marakas and Hornik 1996), or reluctant begrudging acceptance (Brown et al 2002; Jiang et al 2004). Resistance is therefore a reaction, a
symptom (Hirschheim and Newman 1988), an indicator of users attempting to realign the change process, and if it is not considered it can undermine the system implementation efforts and result in malfunction. In a general context, resistance can be understood as the intentional acts of commission or omission that defy the wishes of others (Ashforth and Mael 1998; Newman 1989). More specifically, in an organisational context, we can view resistance as the activities or intentions (Marakas and Hornik 1996) through which those in organisations seek to oppose official and unofficial forms of control (Gabriel 2000, Newman 1989). In an IS context, this might be exemplified as the negative behaviour of system users that may prevent system designers achieving their objectives and, ultimately, system implementation (Markus, 1983). Markus (1983) draws attention to the fact that apart from what causes resistance, there can be different assumptions made regarding the nature of resistance and the role it plays within the organisational environment. The danger of this assumption is that resistance can only be believed to be detrimental if the intentions of the IS designers, IS developers, and IS practitioners, are accepted as desirable or not (Grover et al 1988). There is an attached concern that resistance is viewed as a negative activity that must be avoided.

1.1.2.1 Behaviour: overt and dysfunctional

Resistance, to withstand or oppose, can invoke the image of confrontation, hostility and conflict, a negative idiom that is often used by those initiating the change or those facilitating the change. This tactic of spotlighting resistance as destructive strengthens and privileges management's position so that the rationality in the organisation is justified to triumph over the interests of the users (Newman 1989). Markus' (1983) work, draws heavily from Kling's (1980) examination of theories of resistance, which is based upon a set of assumptions that underlie her three categories/theories namely, system-determined resistance, people-determined resistance, and interaction theory of resistance. The interaction theory however is concerned with the interface between users and systems. What is interesting is that central to this theory is the perception that systems acquire different social and political meaning in different environments and that disparate users also react to the same system differently. It can be argued that a well-designed, correctly specified system is resisted because there may be a potential shift in power
relations or of social status because of the system’s capabilities, the ‘real reasons’ for resistance are the perceived values and social content gain or loss of ‘users’ that occur before or after system implementation (Markus 1983; Keen 1981). Newman (1989) reports that resistance is often viewed as negative, with derogatory actions, with suggestions that these actions should be eradicated. Resistance, therefore, is often portrayed as overt, and unlawful, often involving gratuitous acts of sabotage. User resistance evokes a negative reaction and is often accompanied by an unconstructive stance that resisters may cause unlawful or unwarranted actions. The result is organisational strategies are designed to deal with the resistance rather than to understand why.

1.1.2.2 Behaviour: covert and passive

Marakas and Hornik (1996) argue that the IS literature is lacking in theoretical foundations to explain user resistance in the context of IS implementation. There is a candid outlook amongst some academics (Markus 1983), that better theories of resistance will lead to better strategies. The authors (Marakas and Hornik 1996) includes three theoretical perceptions regarding resistance assumptions that are positioned and influential within the IS community, firstly the perception is that resistance to change is an observable behaviour with associated behaviour. This overt behaviour will be or can be observed by others, manifesting itself as dysfunctional behaviour motivated by criminal intent or personal gain. The second theoretical perception they identify is that resistance to proposed changes could be either an early indication that the system design is potentially flawed (Markus 1983), that it may not be a workable solution or that resistance is viewed as an instrument in a political power battle with users not willing to surrender existing responsibility or influence (Marakas and Hornik 1996; Markus 1983; Keen 1981). The final theoretical perception that illustrates a blurring, misunderstanding or misrepresentation that is often made within the IS discipline in that acceptance and usage of systems can be an indicator of a successful implementation (Davis 1989; Lauer and Rajagopalan 2003). Passive forms of resistance are both hard to detect and problematic, with users demonstrating a reluctant acceptance, with no outward displays of frustration or rejection of the system (Lauer and Rajagopalan 2003; Marakas and
Hornik 1996). The passive resister may resentfully accept the system, customising working practices, silently scheming to conspire in the downfall because a user may exhibit acceptance and resistance concurrently, towards different facets of the system, depending on stance, knowledge, control, or politics, which suggests that resistance, could subsist alongside acceptance.

### 1.1.2.3 Why does user resistance happen?

The IS community certainly has a voice on this matter, but Markus' (1983) research presents practical strategies regarding the theories of resistance, which bridge industry and academia. The author recommends that explanations of resistance are vital because no matter how obvious or intrinsic the theories are; they ultimately guide the strategies and influence management and practitioners attached to ISD. Also argued in this work, is the need to understand the common beliefs and underlying assumptions made, because this will, or should, lead to more effective implementation strategies and management of organisational change. Doolin's (2004) recent research study, exploring how IS may be cloaked as an efficiency exercise or a strategic decision, highlights how the new sophisticated user can influence organisational activities and manipulate technology by facilitating power and control within an organisational setting. Keen (1981) encapsulates the 'why' question with the fact that IS inevitably alters relationships, working patterns, and communication channels and, with that, perceived power, authority and, ultimately, control. The redistribution of information and the breakdown of established monopolies equates to the dissolution of power structures. Change becomes an intruder into the familiar working environment of the users who perceive the IS both as threatening and unnecessary and ultimately as a criticism of their working practices (Keen 1981; Grover 1988; Markus and Pfeffer 1983). Although there exists work that focuses upon reasons for resistance, it predominantly refers to the resister's pathological fear of change, and in the context to IS-related change (Friedman and Cornford, 1989; Selwyn 2003; Hirschheim and Newman 1988).
1.1.2.4 Strategies for overcoming resistance?

The IS discipline is replete with strategies for predicting (Kettinger 2002), pre-empting (Martinko et al. 1996) and over-coming (Keen 1981) resistance. All strategies and rationalisation of this phenomenon eventually influence how resistance is coped with practically in organisations. There is a capacity within some strategies to disregard a significant issue in not contextualising and/or differentiating user groups. In general terms there are many exemplars of non-specific guidelines and/or generic solutions for indistinct users groups that contribute a depth of knowledge to a problematic phenomenon (Keen 1981). Additionally, there are many different models, frameworks and strategies to evaluate user attitudes, on the premise that they are valuable tools for predicting user satisfaction (Barki and Huff 1985) and, hence, a lack of resistance (Al-Gahtani and King 1999; Brown, Massey et al. 2002; Kujala 2003; Venkatesh, Morris et al. 2003; Kettinger 2002). Jiang and Muhanna (2000) report on a variety of strategies that researchers have identified to overcome resistance, which they classify into two groupings: participative and directive. Participative, are strategies that are ‘user friendly’ and focus upon training, building support structures, releasing adequate resources; architecting an optimistic environment. The directive strategies are practical ‘business driven solutions’ and focus upon financial incentives for use of system, user rights directives, role modifications, power redistribution, top management support, job status modification, and job counselling but ultimately job elimination for those who do not want to learn to use the new system. A critical factor which underlies these guidelines or strategies is that ISD is political beast as well as technological animal, ‘resistance is not a problem to be solved … it is a useful clue to what went wrong’ (Markus 1983: 441).

1.1.3 Research Traditions in Metaphors

What are metaphors? Chia (1996) warns that writing about metaphors is precarious exercise in itself; using language to write about the phenomenon of language invites confusion. This is a question that has eluded many philosophers and it is not part of my research objectives or in the remit of this thesis to answer this question in full. The function of this section is to understand the importance of metaphoric usage connected to
the phenomenon under study. There is generalisation of the term metaphor that requires clarity at this point. The distinction is that this study is concerned not with the phenomena of metaphor but with the phenomena of the interpretation and intention of metaphor. This differentiation is crucial and must be emphasised.

The interpretation of a metaphor is very different to the literal understanding and verbal phrasing of a metaphor, as the metaphor’s role is to embellish text or dialogue by applying concepts, ideas terms that belong in one domain to another domain. Schultze and Orlikowski (2001:61) add that ‘Metaphors offer both partial and partisan pictures of the phenomenon they describe’. In reality it is unusual to concentrate on actual words either spoken or when reading, when however a metaphor is used, the recipient has then to understand and to interpret the speaker’s intention. However Ramsay (2004) argues that it is the reader rather than the author that selects the interpretation of the metaphor and because of this the intention of metaphor is unreliable. The author adds also that research has been dedicated to understanding the nature of the metaphor but little research has been devoted to the possible ambiguity of the metaphor. This debate focuses solely on business writing not usage but raises a valid perspective of the intentional usage of metaphor. Yoos (1971) suggests that the success of a well-delivered metaphor can be measured in the appreciation or the apprehension of its targeted audience. The author also warns that the metaphor somehow directs the attention away and guides you to view something in a given way; the use of metaphor is simply not looking but importantly conceiving and imaging something in a given way. Nonetheless the concepts, a well-delivering metaphor and the guiding metaphor can enable and constrain the way of understanding and seeing the world (Yoos 1971; Schultze and Orlikowski 2001). In undertaking this process the person proposing the metaphor is then furnishing the recipient with an alternative perspective of the one commonly taken. The obvious next action in investigating this phenomenon is to pose the question why and what is the intention. However to do this an appreciation of how metaphor shapes our language and more importantly our conceptual thinking is required.
Gibbs (1996) makes the claim that in the last twenty years there has been an explosion of research in cognitive science on metaphors and a significant amount of that research suggests that metaphor is not simple a figure of speech but a specific mental mapping of how people think, people reason and people imagine in everyday life. Linguists Lakoff and Johnson (1981) initiated this important debate in their joint interest in metaphors, Their research on conceptual metaphors in everyday language resulted in the seminal manuscript ‘Metaphors We Live By’ that is constantly cited throughout multi-disciplinary research studies that have a metaphorical theme. In way of offering a point of reference for this metaphorical discussion a synopsis of their work will be considered within in this thesis because the Lakoff and Johnson (1981) research dramatically altered the direction of how metaphors were perceived. The authors suggest ‘philosophers tended to berate metaphor as irrational and dangerous, or ignore it’ (1981: 453) but they argue that a new understanding of conventional metaphor and how metaphor structures conceptual systems will ultimately provide a new perspective on philosophical issues.

The authors further suggest that metaphors pervade all aspects of our lives, speaking, thinking and acting making the claim that not only do metaphors saturate our language, thought and actions but also our conceptual structure, which is metaphorical in its nature (Shen 1999). As the conceptual structure shapes our ‘everyday realities’ then the way individual assume, perceive experiences are very much in a metaphorical mode. Lakoff and Johnston (1980) propose there are two different types of metaphor, the orientational or spatial, linking to the orientation associated with either the positive and or negative origins of the metaphor, this stance contributes further to the debate regarding the positive and negative characteristics of the metaphor (Tsoukas 1990; Grant and Oswick 1997; Morgan 1980,1986). Lakoff and Johnston (1981) further suggestion that the conceptual system is largely metaphoric then thoughts, experiences and basically every automatic action, activity that occurs is a matter of metaphor. Drakopoulou Dodd (2002) also contributes to this debate by adding that metaphors provide insights into how their users, or coiners, perceive their own reality. Metaphors are a product of this cognitive structure and as we are not really conscious of this system then the use of language and indeed metaphors allow some understanding of the conceptual structure – a window in.
Lakoff and Johnston (1981:3) further suggest that ‘language is an important source of evidence for what that system is like’. On the basis of this linguistic evidence the researchers have then established that most of our ‘ordinary conceptual system’ is metaphorical in nature and because of that revelation, identification of exactly what metaphors are that structure our perceptions, our thoughts and our actions can be made (Lakoff and Johnson 1981) As means to explain their suggestion of a concept as a metaphor and how that concept structures a common activity they begin with the concept of an Argument and the conceptual metaphor of Argument is War. Observations of everyday language illustrate this theory and below are a sample of the metaphors they highlight. There is no physical battle but a verbal battle however, we simple do not talk literally of war but in fact we loose battles, we attack, we shoot tactics and our actions and thoughts are very much structured by the Argument is War conceptual metaphor. The fundamental point is that arguments are spoken about in this manner because that is how they are perceived and individuals act in accordance to the way they perceive things. Lakoff and Johnson (1981: 24) explain 'the concept is metaphorically structured, the activity is metaphorically structured, the action is metaphorically structured and consequently, the language is metaphorically structured'. Naturally we attempt to make sense of the world we live in the environment we survive in and in order for us to do this we make use of our existing knowledge and experiences.

1.1.3.2 Current thoughts surrounding metaphors

Metaphors are increasingly commanding more rigorous curiosity and there is a relatively new interest in both the language and discourse, Inns (1997) describes the phenomenon as the ‘linguistic turn’. The additional movement away from positivist assumptions, which have dominated this field in previous decades, have also contributed to this ‘linguistic turn’. This study is an extension of a previous publication concerned with the work on the use of metaphor in poetry (Inns and Jones 1996). ‘In poetry, metaphors can be used as ends in themselves, whereas, in organisations analysis, they often tend to be used as a means to and end’ (Inns 1997). In short, metaphors in poetry are generally not unpacked but they are unpacked and literalised in academic studies, they have to be, so metaphor becomes a functional explicit tool. There is an added value, which must be
highlighted, of the benefits of conducting a comparable study; this will contribute to enrich the singular study.

The current debates regarding metaphors are numerous, they predominantly stem from the validity of the metaphor and what actually a metaphor contributes to understanding the phenomena. Two key debates is firstly assigning metaphors a positive or negative status (Tsoukas 1990; Grant and Oswick 1996; Oswick and Montgomery 1999) Secondly a similar classification is the grouping of hierarchical and non-hierarchical metaphors (Alvesson and Skoldberg 2000). The metaphor is multi dimensional and one dimension is the positive liberating characteristic that aids learning. Metaphors are often relied upon when a completely new experience requires some guidance in understanding (Akin and Palmer 2000) A second, positive status basically suggests that metaphors contribute a non-interventionist view that can enrich knowledge and contemplation. Metaphors should then enable the contribution to continued learning and understanding so earning the positive label (Grant and Oswick 1996). They enable the process of change and re-evaluation of the social structure and organisational structure, the focus is on the generative qualities of metaphors within society. Metaphors are said to have liberating qualities, in that pre-conceptions of a phenomenon maybe completely altered by the application of a metaphor.

‘Metaphor’s generative qualities can be used to open up narrow perceptions of a group and to liberate them from a cycle of negative attributions and defensive behaviour.’

(Inns 1997:313)

A final positive significance of the metaphor is the experimental role that they may facilitate. When a metaphor is applied to a phenomenon it is a process of experiment when used as a tool to explore or change situations (Tsoukas 1990; Marshak 1993; Clegg and Gray 1996; Akin and Palmer 2000; Gibson and Szellmer-Bruhn 2002; Haslam, Postmes 2003)
A suggested conflicting argument is that metaphors can constrain knowledge (Oswick and Grant 1996). Science is proven with accuracy, precision, hypothesis and it is quantitative in nature. If this opinion is preferred then how can metaphors that are said to be a cognitive process (Grant and Oswick 1996), an exchange of experiences and qualitative in nature also make a comparable scientific contribution (Ramsey 2004)? This debate is ongoing and has massive implications to many research disciplines. If metaphors are to be viewed as non-scientific and that the worldview can only be understood via an empirically based course surely this outlook may also constrain knowledge. Avesson (2002) contributes to the debate that from a traditional scientific point of view, it is difficult to translate metaphors into more precise, objective language and this does elude rigorous measurement and testing. Furthermore metaphor has the ability to both illuminate and hide aspects of a particular phenomenon. These issues are not arguments against using metaphors rather they are suggested health warnings for the use of objective approach. Metaphor is regularly used as a deciphering tool for the extraction or analysing the meanings of various aspects of organisations. These come under the guise of observing metaphoric language in use within the organisation in order to interpret underlying assumptions or the introduction of metaphors to alter perceptions ultimately introducing organisational change. The metaphor is widely relied upon in many different disciplines to engage in many research problems.

1.2 Research Objective

Although metaphors are rapidly becoming a legitimate research tool in IS little attention has been made between the links of resistance and metaphors research. Within IS metaphors based studies usually use metaphors as a ‘way of seeing and thinking’ and in some cases as a deciphering lens within organisations. Alternatively other disciplines, such as OS, have fully embraced this multi-faceted device and there is evidence of metaphor as a generative tool for creative thinking, explicit teaching tools, and often as a change management tool.
The objective of this study is to explore the use of metaphors in an IS project. The emphasis is upon the use of metaphors to coerce certain users into compliance with management aims for the project and to avert resistance.

In order to achieve this objective, I have:

- Conducted a review of the metaphor literature published within the OS and IS field (Chapter 2).
- Conducted a review of the IS user resistance and user participation literature (Chapter 3).
- Gone 'native' for an intensive three-year period to conduct an in-depth ethnographical study of metaphor use and user resistance in an IS project (Chapters 5 and 6).
- Provided rich insights into the mutually reinforcing nature of different types of metaphor and their role in attempts to avert resistance in IS projects (Chapter 7).

A distinction of this thesis will be the resonance of the research collected over the three-year period that has informed this research. The strength of this research is the 'insider's' perspective and being at the organisation as such a transformational period.

1.3 Organisation of this thesis

Chapter 2 presents a review of available metaphor literature in an effort to find other instances of metaphors being used in IS projects to coerce certain users into compliance with management aims and to avert resistance. This review activity revealed that though metaphors are rapidly becoming a recognised research tool and also the focus of the research process, conversely the use of metaphors is more ubiquitous in other research
disciplines, the IS discipline is yet to fully accept this versatile approach. Two disciplines were selected in which to manage the review, OS and IS. The chapter is structured by undertaking literature from OS first and then pertinent metaphor literature from IS is dealt with. The OS discipline has been selected as a comparable discipline as metaphor is already an established research tool. Gareth Morgan's influential work has built a strong association between metaphors and organisations and the ethnographical field study was organisational based. A thorough investigation was made on detecting any existing reports or studies regarding metaphor as a tool in combating user resistance. Inns (1997) developed a preliminary taxonomy to make sense of the complex and diverse use of metaphor in organisational analysis that has been adapted for this study.

Chapter 3 examines the second area of literature that was constructed as the backdrop of this thesis. This chapter is concerned with how the IS community understand user resistance and user participation, this review of the literature revealed that there is a confusion of or lack of general agreement regarding the terminology used within this phenomenon. A second finding from the literature review is how the user is often perceived by academics and practitioners alike as a homogeneous group rather than heterogeneously. These perceptions can then influence practitioners and academics recommendations, solutions, and guidelines in dealing with user resistance. Subsequently the positioning of this thesis' research in the overall body of resistance IS literature has been established.

Chapter 4 discusses the research methodology for this thesis, this chapter firstly looks at the research traditions in IS, following that the next section presents an ontological foundation for this study and from that the epistemology approach adopted is considered. The research strategy that is consistent with such ontology and epistemology, qualitative research, is then explored in relation to the research issues of this thesis. Following this the data generation method adopted is then dealt with. In closing this chapter an evaluation of the research methodology is discussed.

Chapter 5 presents the data from the ethnographical field study conducted over a three-year period at a Managing Consultancy Jarman, based in the North West of England.
research period was from the Winter 2000 (December 2000) until the Winter 2003. Throughout this period Jarman experienced two major IS investments, referred to in the chapter as Phase 1: Migration Project and Phase 2: the Client Tracking Project. This was a period of extreme change for Jarman as technology had enabled a rapid geographical expansion from two sites to six sites across the UK. A comprehensive introduction to the organisation and its workforce is given. The two IS investment phases are dealt with in isolation; these include drivers for change, and a detailed review of each project. Due to the nature of this 'insider' study, observing events at close hand, it was difficult to separate the presentation of the generated data and the analyses of the data. For a sense of continuity in the Tigger and Eeyore story at Jarman the case data and the case analysis are interwoven, to separate the two areas distinctly would result in a disjointed flow. However the following case analysis chapter positions the research concern, of the use of metaphors to avert user resistance, against the metaphor and user resistance literature discussed previously.

Chapter 6 is a supplementary case analysis chapter presenting additional analysis of the findings from the ethnographical study. In this chapter the focus is on the positioning of the findings against identified IS metaphor and user resistance literature. A closer enquiry of how this research study contributes to the identified gap in the IS arena, regarding the growing significance of metaphors as a legitimate IS research tool, will also be included. Lastly it is important to establish the absence of other IS studies having identified and reported upon the use of metaphors to avert user resistance.

Chapter 7 summarises the overall findings of the research. The chapter is reflective in nature including a review of the research objectives and a discussion of the research process. This will include a discussion of the advantages and disadvantages of the conflicts faced by conducting research as an 'insider' and being so 'close' to the research issue. The thesis closes with the recommendations for future research.
2 The Application of Metaphors

2.1 Introduction

This chapter follows the Introduction to this thesis and forms the second phase of reviewing metaphor literature. The metaphor literature was introduced in the previous chapter, looking at what metaphor actually is and offering some current thoughts surrounding metaphor. Metaphor is slowly becoming an accepted research tool within the IS discipline, while, conversely, the use of metaphors is more ubiquitous in other research disciplines. IS and Organisational Studies (OS) have been selected in which to structure the review of metaphor literature for this chapter. The OS discipline has been selected as a comparable discipline to IS as metaphor is already an established research tool. Additionally the field study was situated within an organisation so this became a natural direction and this association has been established with Morgan's work. A theoretical framework was required to fully explore what was currently known and published regarding metaphor research. Inns' (1997) work was drawn upon at this classification stage. The author had previously conducted a comparable review of existing writings on the main uses of metaphor under the organisational analysis banner. Inns (1997) developed a preliminary taxonomy to make sense of the complex and diverse use of metaphor that has been adapted for this study. An investigation was conducted to search for any existing reports or studies regarding the use of metaphor in IS projects. Here the emphasis is upon the use of metaphors to coerce certain users into compliance with management aims for the IS projects while averting resistance. The chapter starts with a review of how metaphor is defined by the academic community.
2.2 The multi-perspective metaphor

"It is through metaphors that we make sense of strange, novel or complex situations. We do this by casting the unfamiliar in terms of something which we are familiar."

(Alvesson and Skoldberg 2000)

Table 2.2.1 presents a sample of metaphor definitions from a broad range of disciplines. Nevertheless, each definition has a common attribute, insofar as they all tend to agree that metaphors are extremely useful for understanding one phenomenon via the experiences and knowledge of a more familiar phenomenon. An interesting observation is the subtle nuances that a number of the authors allude to in their definitions, Lakoff and Johnson (1981), Grant and Oswick (1997), Lundin (2003), to the cognitive process of metaphors whereas Charteris-Black (1997), Marshall (1993) and Drummond and Hodgson (2003) to the linguistic attributes of the metaphor. This is an interesting distinction that requires further probing but stands outside the remit of this research study. The Morgan (1986) offers a certain clarity to an ongoing deliberation in attempting to define the role of a metaphor, claiming ‘we use metaphor whenever we attempt to understand one element of experience in terms of another. Thus metaphor proceeds through implicit and explicit assertions that A is (or is like) B’ (Morgan 1980:610). Whereas MacKechnie and Donnelly-Cox (1996) add, somewhat confusingly, to the ongoing deliberation that ‘the use of metaphor and similar figures of speech is a mode of analogical thinking and writing in which the verbal expression is ‘put for’ something which by definition transcends adequate verbal expression’. Below are some more simple examples:

<table>
<thead>
<tr>
<th>Definitions of Metaphors</th>
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<tr>
<td>The essence of metaphor is understanding and experiencing one kind of thing or experience in terms of another.</td>
<td>Lakoff and Johnston 1981</td>
</tr>
<tr>
<td>They are the outcome of a cognitive process that is in constant use – a process in which the literal meaning to a</td>
<td>Grant and Oswick 1997</td>
</tr>
<tr>
<td>Phase or word is applied to a new context in a figurative sense</td>
<td>Charteris-Black and Ennis 2001</td>
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<tr>
<td>Metaphor as a linguistic phenomenon in which a word or expression is used in a particular context with a sense other than the one which it normally has in other contexts</td>
<td>Marshak 1993</td>
</tr>
<tr>
<td>A figure of speech containing an implied comparison, in which a word or phrase ordinarily and primarily used for one thing is applied to another, E.G., the curtain of the night</td>
<td>Alvesson and Skoldberg 2000</td>
</tr>
<tr>
<td>Metaphor indicates some kind of correspondence between two different phenomena. For instance, 'My love, a rose' suggests similarities between the object of the tender flame and the botanical phenomena. Corresponding properties may be sweetness, beauty, fragrance and fauna.</td>
<td>Akin and Palmer 2000</td>
</tr>
<tr>
<td>It is through metaphors that we make sense of strange, novel or complex situations. We do this by casting the unfamiliar in terms of something which we are familiar.</td>
<td>Drummond and Hodgson 2003</td>
</tr>
<tr>
<td>A metaphor is a linguistic device whereby one phenomenon is understood in terms of another. For example, the notion of a computer possessing a 'memory' enables us to conceptualise its storage capabilities, whilst the notion of a 'virus' highlights the potentially contagious nature of a computer malfunctioning</td>
<td>Lundin 2003</td>
</tr>
<tr>
<td>Metaphors are images that can help us to see some aspects, while leading us to ignore others. Metaphors are mind-stretchers on the one hand and mind-closers on the other.</td>
<td>MacKechnie and Donnelly-Cox 1996</td>
</tr>
<tr>
<td>the use of metaphor and similar figures of speech 'is a mode of analogical thinking and writing in which the verbal expression is &quot;put for&quot; something which by definition transcends adequate verbal expression</td>
<td>Morgan 1980</td>
</tr>
<tr>
<td>We use metaphor whenever we attempt to understand one element of experience in terms of another. Thus metaphor proceeds through implicit and explicit assertions that A is (or is like) B</td>
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Metaphors are particularly useful for defining and understanding new phenomena because they serve as carriers of meaning from a situation that is well understood to one that is not.

<table>
<thead>
<tr>
<th>Schultze and Orlikowski 2001</th>
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<tbody>
<tr>
<td>Table 2.2.1: The multi-perspective metaphor</td>
</tr>
</tbody>
</table>

2.3 How we make sense of metaphors

As has been acknowledged, metaphors are complex and difficult to actually define. The dominant problem is whether a metaphor is a cognitive phenomenon related to how we understand things or whether it is a linguistic phenomenon related to how we express them. There is a complexity between thought and language and this is constantly debated in diverse disciplines from philosophy and phenomenological research, the study of pragmatics, or cognitive sciences, to the study of the use of metaphors within IS. Bergmann (1982) is concerned with the use of metaphors to make an assertion, which is an obvious enough claim, but for some this claim contradicts the nature of metaphor. Metaphor, as reported in Table 2.2.1, is generally agreed to have common attributes but also the ability to add a certain richness or expansiveness to an expression. It is then argued that this added dimension of richness then precludes that what is said literally cannot be said metaphorically. Bergmann (1982) offers two reasons why the richness of a metaphor might be assumed to preclude its use in making an assertion or claim. Firstly, assertions usually have fairly defined contents, all be it with fuzzy edges. But a metaphor when deciphered may have many meanings and ambiguities. Secondly, if metaphors can convey many meanings then it may be difficult for those making the assertions to assert what is intended. Though it can be argued that for individuals who use metaphors to make assertions they do not necessarily intend to assert everything that a metaphor can deliver. Bergmann (1982) tentatively adds that without knowing the context of the metaphor, and who the author or orator is, it may be impossible to state categorically what the metaphor means without pondering on what it could mean. Consider a metaphor long enough and the meaning and interpretations will become endless. Introduce a well-defined context and a real life author and the situation drastically alters. Bergmann (1982)
argues that the author of the metaphor must use a carefully selected metaphor to successfully assert a proposition or intention.

McCloskey (1964:215) asks 'what is it then, what we are doing when we use words metaphorically? How does a metaphorical word function?' It may be prudent at this point to highlight that this citation is over forty years old and the previous included study was over twenty years old, but that their findings are still valid for this study. To answer this conundrum it may be necessary to compare metaphorical language with literal language. McCloskey (1964) in choosing a strange metaphor describes the process as parasitic, in that metaphor uses assume literal uses but literal uses do not assume metaphorical ones. To understand metaphorical language we must understand the link between it and literal language. What familiarities does the thing called by a metaphorical word have to those called by the literal word and what familiarities does the metaphorical word have to its literal use? McCloskey (1964) suggests that it is not the familiarities but the differences between the familiarities that is essential. The differences between things called by a metaphorical word and things called by a literal word must be significant and important. Metaphors do not offer a literal meaning but a metaphorical explanation and that can naturally introduce ambiguity to the phenomenon under investigation. In extending the literal expression discussion, Glucksberg (2003) suggests that it is as easy to understand the metaphorical meaning as quickly and automatically as it is to understand literal meanings. However, the thought process is an awkward one because when a metaphor is uttered we initially derive the literal interpretation and then reject that interpretation because it makes no sense. Metaphors are initially accepted as false assertions, the literal false meanings must be rejected and an alternative non-literal meaning is found (Glucksberg 2003). However, metaphorical meanings are understood as quickly and automatically as literal meanings.

2.3.1 Source and Target Domains

Another definition of metaphor (and there are many) is the selective mapping of properties, sometimes described as candidate properties, from one conceptual domain (the source or metaphor vehicle) onto another (the target or metaphor topic). Ramsay
(2004) logically offers Alvesson and Skoldberg's (2000) logical metaphor model as a visual representative and he concedes that all researchers are not in dispute of the actual fundamental structure of the process (see Figure 2.1). Schultze and Orlikowski (2001:52) describe the source domain as the context or conceptual sphere in which that phrase has a literal meaning and is well understood and it is from this sphere that the actual meaning or understanding of the concept is transferred into a different sphere (the target domain).

![Figure 1: A first level metaphor](Source: Adapted from 'Alvesson 1994)

Figure 2.1: A first level metaphor *(adapted from Alvesson and Skoldberg 2000)*

This theory also has issues in that among the properties that can be interpreted to be mapped there is a hierarchy (Glucksberg and McGlone 1999; Shen 1999). Shen (1999) refers to the ‘mappability’ of candidate properties, observing that pertinent and relevant properties are more likely to get mapped than others. For example, in the case of ‘she ran like the wind’, the candidate properties that have ‘mappability’ are the speed or swiftness of wind, not the blustery or stormy properties. The hierarchy of mapping applies only to candidate properties, which can be mapped because they have features that correspond to the target domain. But what characteristics do certain properties have in preference to other properties in order to become ‘mappable’?
The commonly found answer focuses upon the relational position occupied by the ‘source domain’ within its ‘target domain’ in relation to other features of that domain. Preference is given to the relational or candidate properties that determine the position held by the ‘source domain or metaphor vehicle’ in relation to other components in the ‘target domain or metaphor topic’. Glucksberg and McGlone (1999) report on a metaphoric comparison via a feature-matching process. The features of both the ‘source domain’ and the ‘target domain’ are exhaustively verified against one another, and once the matching features are identified those that are relevant become the relational or candidate properties. So it is the relational or candidate properties that determine the position of the source domain within the target domain and it is those relational or candidate properties that get mapped. Lakoff and Johnson (1981) put it simply by saying that sometimes part of the metaphorical concept does not and cannot fit.

Metaphors present an incomplete image, they act as a directive of one experience to another, guiding the recipient’s perception. However, there are many who warn that metaphors place a spotlight on certain aspects of a concept but that a second function of using a metaphor is to hide, to redirect attention away from other aspects of the concept. (Yoos 1971; Lakoff and Johnson 1981; Bergmann 1982; Akin and Palmer 2000) There is no doubt that metaphors contribute a certain insight, an extension, and compel a more rigorous scrutiny by the receiver than by what can be said or written literally.

2.4 Academic Context of Metaphor

Literature of general metaphor usage from the IS and OS discipline will be reviewed respectively in the first section of the chapter. An objective of this research process is to gain a perspective of the IS community’s position regarding metaphors, also making a comparable evaluation of the perception of metaphor within another closely linked discipline, OS. The latter section of the chapter is concerned with categorising literature from both the IS and OS disciplines against the preliminary taxonomy. A comparable critique will then conclude the literature analysis.
2.5 Metaphor: the preliminary taxonomy

"Metaphor in the Literature of Organizational Analysis: A Preliminary Taxonomy and a Glimpse at a Humanities - based Perspective."

Inns (1997).

There is currently a gap within existing studies regarding reviews of contemporary literature for the grouping and classification of metaphors. It is with this directive that Inns' (1997) work is drawn upon at this classification stage, as the author has conducted an extensive review of available literature on the main uses of metaphor in organisational analysis, and has developed a preliminary taxonomy to structure subsequent research. However, although there are other relevant reviews on metaphor literature the scarcity of the reviews presents an interesting conundrum: why? Additionally, this depleted area of IS research highlights a need for further research, especially of such a multifarious topic as metaphor. Nevertheless, Winsor (1996) contributes a rigorous review of the usage of the military metaphor perspectives employed at an organisational level. This study enables the observation of the multifarious metaphor in action, the powerful and persuasive metaphor for example. There are many instances of the functional metaphor highlighting the 'source' and 'target' components and this illustrates the facilitation of the metaphor as a research tool. Dunford and Palmer (1997) also conducted a comparable search of metaphorical language, casting their net in a pool of Management Studies industry literature with a distinct focus upon one premise of metaphors, corporate downsizing. They offer the assertion that the reviewed management literature contained a range of metaphors that structured the ways issues were debated and outcomes were framed. Sapienza (1985), in a comparable study, is concerned with the senior management decision-making discourse, and her findings indicate the their behaviour reflected the dominant metaphors in use within their organisations. Drakopoulou Dodd (2002) further contributes to this debate; again with a similar study to Sapienza (1985), focusing upon CEO and senior management language and, again similar to Dunford and Palmer (1997), she restricted the review to industry publications only. Drakopoulou Dodd
adds that metaphors provide insights into how their users, or coiners, perceive their own reality. Consequently there are some available reviews of metaphors in use as indicated by those mentioned above but they have similarities in their focal point - the discourse of a certain group of organisational actors, or the review of a commonly used organisational metaphor. On the other hand, Inns’ (1997) taxonomy is unrestrictive, taking account of the main uses of metaphor in organisations, and in this regard it currently stands in splendid isolation. Importantly, it presents an ideal framework to structure the literature pertaining to this thesis. The structure of this following section will be as follows: the taxonomy will be unpacked and then each of the five categories will be explained. The selected research and publications of this thesis review both information systems and organisational studies disciplines to form a second category tier. The aim of this second category tier is to identify and highlight any significant differences or common uses that the two disciplines share when dealing with metaphor. Examples and illustrations of the application of metaphor in OS and IS literature will then be categorised separately under each of the five categories headings. A conclusion of conducting this metaphor literature review using this rigorous theoretical framework will be the ‘plugging of the gap’ with a possible unique review of metaphor usage in the Information Systems discipline and contributing to the existing body of knowledge in OS, and to actually complement Inns’ (1997) existing study. An additional finding would be of any studies which could not be categorised within the taxonomy, thus provoking further commentary, aiding the refinement of the preliminary taxonomy model at a future stage, as the author invites.

2.5.1 The Preliminary Taxonomy: an explanation

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<tr>
<th>A Preliminary Taxonomy of the Uses of Metaphor in the literature of Organisational Analysis</th>
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Metaphor as a generative research tool

Metaphor as a hegemonic tool to influence perception and interpretation

Metaphor as an explicit, teaching tool

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<tr>
<td>3</td>
<td>Metaphor as a generative research tool</td>
</tr>
<tr>
<td>4</td>
<td>Metaphor as a hegemonic tool to influence perception and interpretation</td>
</tr>
<tr>
<td>5</td>
<td>Metaphor as an explicit, teaching tool</td>
</tr>
</tbody>
</table>

Table 2.2.2: A Preliminary taxonomy of users of metaphor in the literature of Organisational Analysis (adapted Inns 1997)

The adapted taxonomy consists of five categories (see Table 2.2.2) that were developed implicitly to draw out trends and to consider underlying assumptions of Inns’ (1997) review of the uses and/or application of metaphor. This is an adapted version of the taxonomy; a sixth category, ‘metaphor as a tool for deconstruction and the questioning of embedded assumptions’, was not included for the purpose of this study. Inns (1997) reports that there are few writers that have used metaphors as tools for deconstruction or harnessed its power to re-evaluate dominant assumptions and self-reflexivity. Morgan (1997) is referred to as one writer who suggests that by exploring the metaphors used in this way, individuals can self-reflect and acknowledge limitations that they place upon themselves. There was insufficient literature found either in the IS or OS field to warrant the inclusion of this sixth category.

Inns (1997) warns that her review of literature was comprehensive but not exhaustive and that there are limitations of the taxonomy, which will be explored at a later stage in this section. The first classification is the ‘examination of the root metaphor of a subject’ and the aim of this category is to analyse the work of authors who explore hidden assumptions by tracing the root metaphors of the selected research subjects. The root metaphor highlights the dominant perspective or way of ‘seeing’; the root metaphor often then structures the thought process that can be observed through language, images or symbols at large within the research location (Shen 1999; McGlone; Alvesson and Skoldberg 2000; Manghan; 1996; Grant and Oswick 1996; Abel and Sementelli 2004).
The second classification is 'metaphor as a qualitative research tool'. There is widespread debate and somewhat of an acceptance in some areas that is supported by empirical research, from a variety of professional sources, including academics, practitioners and consultants, that metaphor can be used and is used as a valuable qualitative research tool. The interpretation of metaphors in use within organisations, it is argued, can offer the reviewer access into hidden insights and opinions of which the organisational workforce may not be aware. On the other hand, interpretation may reveal insights and opinions that the workforce are consciously attempting to conceal (Lakoff and Johnson 1981; Neilson 1992; Marshak 1993; Barnett 1996; Broekstra 1996; Chia 1996; Clegg and Gray 1996; Inns and Jones 1996; McCourt 1997; Alajoutsijarvi, Eriksson et al. 1999; Akin and Palmer 2000; Gibson and Szellmer-Bruhn 2002; Haslam, Postmes 2003; Lamberg and Parvinen 2003). There are obvious advantages of gaining these insights but a health warning is required, for some consultants or change agents make the assumption that interpretation of metaphors is somehow an uncomplicated process, and believe that they can understand an individual's personal perspective. This understanding is then used as part of an organisational change strategy. Inns (1997) warns that there are problems associated with advocating this use of metaphor interpretation that rejects the possibility that any ambiguity may take place in the interpretation process and furthermore it ignores the fact that consultant and change agents could bring personal opinions and bias that would cloud and prevent a true interpretation of metaphors in use. However this process is well documented and examples of metaphor being used as a qualitative research tool will be reported on further in this chapter.

The third category, 'metaphor as a generative tool for creative thinking', possibly underlies all of the categories and therefore Inns (1997) questions whether the topic should be allocated as a separate category at all. Creative thinking is required when using metaphor as such. However, Inns (1997) justifies the inclusion of metaphor as a generative tool when applied in a structured manner in an organisational environment that has goals and outcomes required as deliverables from the process. Oswick and Montgomery (1999) conducted a metaphor-based investigation of managers and team leaders of UK subsidiaries of a large US multi-national organisation. The participants were asked two questions: firstly, 'if your organisation were an animal what animal
would it be?'; and secondly, 'if your organisation was part of a car, what part of a car would it be?' This study highlights the need for such a category of metaphor as a generative tool for creative thinking, as these authors argue, regarding 'the value of metaphor as a way of generating insights into organisations and organisational phenomena' (Oswick and Montgomery 1999:501). This research study will be elaborated upon with additional illustrations of metaphor, as generative tools will be reported further in this chapter.

The fourth category, 'metaphors as a hegemonic tool to influence perceptions and interpretation', examines the communicative role of the metaphor and its ability to evoke emotional responses from those targeted by hegemonic language disguised by creative language. Inns (1997) adds that there is a sinister and purposeful function of using metaphors as a hegemonic tools to alter perceptions, to nurture emotions in an exploitative manner, which will then influence and reshape participants' perceptions. Stephens (1994) observed five Chief Information Officers (CIOs) over a period of time and found that seventy-five percent of their days consisted to either face-to-face or phone communication. Each of the CIOs made use of the persuasive power of metaphorical language to communicate their message to the workforce. One CIO argues emotively that his IS team should 'respond to a failure like a parent responds to a baby on an iron lung. We can't react to the child screaming, we should be the first to know if the power went out.' (Stephens 1994: 9) This reported example of the use of passionate language involving sick and possible dying babies to rally his team could be described as extreme. The use of persuasive, powerful and influential metaphors will be illustrated and elaborated upon later in this chapter. It is this category that is most relevant to the research focus of this thesis, where the use of metaphor has been observed in combating user resistance.

The fifth and final category, 'metaphor as an explicatory, teaching tool', is an obvious one as a common usage of metaphor is to explain something abstract or unexplainable in a familiar manner using terminology from a recognisable domain. Inns (1997) suggests that a metaphor used in this manner is memorable and refers to Morgan's study (1986) as a landmark study for the way he explored the different schools of thought in OS and their
beliefs and assumptions through descriptive metaphors. Using the same structure to unpack this topic as the other classifications, this category will be illustrated and explored in depth at a later point in this chapter.

Whilst Inns (1997) includes within the preliminary taxonomy categories that this thesis' subject matter has but tenuous links to, it provides an ideal theoretical framework and a powerful contribution to the phenomenon of metaphor that are both fundamental resources of this thesis. What could be described as a major strength of this research is how the Inns study clearly indicates the restrictions and limitations of using a categorisation approach. There are four limitations highlighted and each will be explained below:

1. This first limitation is concerned with taxonomies (a science of classifications) in general, when attempting to simplify a complex field but Inns (1997) invites discourse regarding the classification process. Exceptions and omissions of metaphor usage can be highlighted by this initial taxonomy (the taxonomy is stated as preliminary an almost draft or pilot version). The author aims to invite discussion and debate so the taxonomy can be continuously enhanced, a work in progress. It is this invitation that presented the opportunity to use the taxonomy framework when structuring metaphor use in the IS discipline.

2. The second limitation is concerned with blurring boundaries, that most definitely will occur when presenting distinct categories, though this restriction is possibly negated when positioned against the vital importance of the process of categorising, and separation in understanding the theoretical assumptions and perspectives of the research selected.

3. The third limitation is the assumption of the classification that some authors and writers will naturally be allocated. It is apparent that many authors use ambiguous approaches and it is not the authors that are categorised but their uses of metaphor.
4. The final limitation highlighted by the author (Inns 1997) is that the taxonomy categories are based on the author's personal, subjective reading of different publications. One could argue that a biased opinion could be made but it is through an exercise of this nature that common trends and assumptions are highlighted and revealed. Naturally, this same limitation also affects any researcher or author when using taxonomy as part of their methodology.

Table 2.2.3: Limitations of using a categorisation approach (adapted Inns 1997)

Inns' (1997) main aim was the suggestion of the preliminary taxonomy of the use of metaphors in organisational studies. Comments, debates and discussions deriving from such a classification would only themselves contribute and add to the taxonomy because Inns quite clearly sees the classification as one that will only ever evolve. This honesty and approach can only contribute to the organisational analysis body of research, and the taxonomy can become a vehicle for discussion amongst her peers. In addition, her metaphoric investigation of current literature is best placed to highlight areas that are currently deficient in the use of metaphor in organisational analysis. The remainder of this chapter will firstly consider metaphor through the lenses of Information Systems and then Organisational Analysis, followed by illustrations of the application of metaphor found in OS and IS literature, categorised separately under each of the five category headings. This will be followed by any findings or limitations that have been uncovered through this research approach.

2.5.2 Organisational Studies

The lens is now turned towards the second discipline, Organisational Studies, so that a contextualising process can be conducted. A view of how the OS discipline portrays the use of metaphors is understood, so ensuring that an appropriate environment is constructed in which to position the metaphor literature. The OS discipline is top-heavy in the volume of metaphor research in comparison to the IS discipline, as is apparent by simply noting the volume of articles, papers and published metaphor research which have
been amassed for this study. This number far outweighs the amount of pertinent metaphor research that has been gathered from the IS discipline. This factor introduces a different array of issues about how to deal with such a volume of literature and as such the contextualisation process of the OS discipline will be dealt with in a different manner to the IS discipline. Rather than look towards OS literature to guide how this community understands, applies or utilises metaphors, there is a more natural route, focusing upon the work of the highly acclaimed and much cited academic Gareth Morgan (1986, 1993). Focusing upon Morgan’s (1986) contribution to metaphor usage in OS should offer some clarity as to how metaphors are used, misused or abused within this discipline. This also includes some commentary about how other academics conceive and perceive his work.

Gareth Morgan’s (1986) contribution to this debate warrants an inclusion in any discussion on metaphors. He claims that organisations are complex and are a myriad of paradoxical phenomena that can be understood in many different ways. The facilitation of metaphors invites alternative managing strategies and problem solving approaches, enabling organisations to be seen in a new way (Morgan 1986). Morgan (1986) believes that many of our ‘taken for granted’ ideas regarding metaphors are in fact metaphorical, the most common one being the organisation as a machine, Lindsay, Downs et al. (2003) focus on the machine metaphor in the context of business process re-engineering. Oates and Gavin (1996) propose a move from the limitations of the machine metaphor in software engineering, proposing the explicit use of a range of metaphors. McCourt (1997) uses Gareth Morgan’s (1986) metaphoric approach as the underpinning to assess the value of a metaphoric perspective in understanding organisation studies. Morgan’s metaphoric work is authenticated in that it is persistently referenced by academics from an extensive range of disciplines, in fact reiterating what is an ongoing debate regarding the metaphor phenomena. Though some authors quite simply use Morgan’s (1986) work as a recipe or template into which to drop their own research, other academics attempt to unravel and dissect his work (McCourt 1997; Mangham 2001; Lindsay, Downs et al 2001). Returning to McCourt’s (1997) use of Morgan’s (1986) metaphoric thinking approach as the underpinning to assess the value of a metaphoric perspective for attempting to understand organisations, he refers to Tsoukas’ (1990) theory that metaphors are the missing link between lay and scientific discourse. McCourt asks
whether this theory lives up to its promises and refers to Gareth Morgan research. McCourt (1997) examines a number of Morgan's (1986) perspectives in detail: firstly, that metaphors are not decorative linguistic devices but are fundamental elements in scientific thinking, which is part of the process of scientific enquiry; and secondly, following from the first claim, that if metaphors are fundamental to scientific thought then thinking metaphorically should offer insights into how organisations behave. McCourt (1997) argues that there is tangible added value in using metaphors when analysing organisations. However, the author regards metaphor as a useful analytical technique rather than the fundamental and indispensable tool that Morgan claims it to be. Nevertheless, McCourt’s (1997) article does highlight the increased number of studies that use a metaphoric approach, and the undeniable insights into organisations that have been derived from these.

Morgan’s (1986) work is often cited in discussions relating to research of metaphors and organisations, and to deliberately exclude this contribution would be imprudent and may potentially negatively impact upon the rigour of the overall research. However interesting the critiques of his work are they are not all positive and (Lindsay, Downs et al. 2003) question Morgan’s contribution. Their research focuses on the business processes and a rich synopsis of their interpretation of business procedures. A major observation from their study (Lindsay, Downs et al. 2003) is that most definitions of business processes are based on Gareth Morgan’s machine metaphor and the suggestion made is that this metaphor is too limiting to define business processes, not taking into account how dynamic the organisational environment can be. Mangham (1996) offers a strenuous argument, confidently stating that both Aristotle (who claimed that metaphors was a matter of having an eye for resemblances) and the Oxford English Dictionary (which claims that metaphors are figures of speech, by which a name or descriptive term is transferred to some object different but comparable) are incorrect in their definitions of a metaphor. Mangham (2001:21) though recognising Morgan’s influential contribution for recognising that ‘the use of metaphor implies a way of thinking and a way of seeing that pervades how we understand our world generally’, observes that Morgan does not expand on these theories. It is Mangham (2001) who boldly takes up the mantle to investigate, where Morgan ‘trod gingerly’. Mangham’s 2001 writings entitled ‘Some consequences in
taking Morgan seriously', identify some of Morgan’s linguistic expressions used in his earlier writing, when he is not writing specifically about metaphors. The rationale for this, Mangham explains is, to reveal Morgan’s unconscious and automatic use of everyday metaphors illustrating that Morgan possibly trivialises the role of metaphor by selecting ‘idiosyncratic’ metaphors in place of ‘fundamental’ and ‘deep’ metaphors. Grant and Oswick (1997: 214) also add that an implication of Morgan’s work is that an ‘organisation is transformed into a supermarket of metaphors which customers can visit to purchase and consume its conceptual wares according to their brand preferences and purchasing power’. However, Morgan (1997) warns, in a response to the Mangham (2001) paper, that a big problem within the field of metaphor is that writers, he and other writers, often present their own personal perceptions and that this is often a trap that writers fall into. He reports that he himself has fallen in. Morgan (1997) warns that when focusing on any domain of study through the use of metaphors the process inevitable introduces “partial truths”. When bridging a concept from one domain to another one should always be aware of the strengths and limitations that metaphors may present.

The strengths Morgan (1986) observes are the in-depth insights that metaphor can reveal, while the limitations are that no metaphor can ever capture the totality of experience because by revealing one route they exclude others. A further significant factor of Morgan’s extensive contribution to the understanding of metaphors, the application of both organisational metaphors and organisational procedures, has been ingeniously described by Grant and Oswick (1997:214). They state that Morgan has considered the ‘organisation of metaphors’ and the ‘metaphors of organisations’. It is these influential and impressive observations that place Morgan in such an authoritative position on metaphors.

2.5.2.1 Organisational Studies: examination of the root metaphor of a subject

This category analyses the work of authors who explore hidden beliefs by tracing the root metaphor of a subject. The most significant word is ‘subject’ and this taxonomy is solely concerned with metaphors in organisational analysis, which differentiates this category from metaphoric linguistic debates regarding the target and source domains (Shen 1999,
McGlone 2003, Alvesson and Skoldberg 2000, Mangham 1996, Oswick and Grant 1996). However the ambiguity of the metaphor phenomena is constantly highlighted and the taxonomy classification boundaries immediately blur when attempting to group this following study. Akin and Palmer (2000), who are both academics and organisational practitioners, propose a valid and extended contribution to the root metaphor debate. Their study focuses upon how change agents exploit metaphors for diagnosis and intervention purposes within organisations. They comment that the utilisation of metaphors is becoming a common occurrence within the organisational consultation profession. Discourse analysis is a key component of their study, with the observation and study of language, and the identification of what and how metaphors are used, revealing crucial insights into how the organisation is communicating meaning and what emotions and reactions are expected of the workforce (Akin and Palmer 2000). A component of this methodology is the identification of the root metaphor, which is why this study sits within this category and not the qualitative research tool category. Akin and Palmer (2000) suggest that there are two fundamental intervention approaches that can be used when identifying the root metaphors. The approaches are an etic (from the term phonetic, which refers to the meaning of elementary sound in language) approach and the emic (from the term phonemic, which refers to the properties of elementary sounds in language) approach. An emic perspective is a research approach to observe how the members of a given culture, group or society perceive their world. The etic perspective is a research approach to study the way non-members (outsiders) perceive and interpret behaviours and phenomena associated with a given culture, group or society. The authors reveal that this identification of the two options (emic and etic) is their contribution to the field of change management (Akin and Palmer 2000). In making this observation they provide change agents with an opportunity to reflect on their current usage of metaphors and further opportunities to use metaphors in different and novel ways when intervening in organisations. Marshak (1993) agrees with this argument and adds that any organisational change requires the deliberate widespread application of metaphor as a way to induce new ways of conceiving a situation. This is a transformational process, through the deliberate introduction of abstract change metaphors to achieve ‘out of the box’ thinking, thus disenabling ‘in the box’ thinking.
This latter discussion could be described as in Oswick and Grant’s terms as ‘organisation of metaphors’ then, the following discussion could be also be described in their terms as ‘metaphors of organisations’ because when analysing discourse, narrative and images, the identification of a root metaphor can act as a window into the organisation (1997:214).

Grant and Mack (2000) present an exploration of metaphor as a root subject, which illustrates this category; an investigation of the new and old industrial relationship. The old industrial relations and economic climate in Britain in the pre-1980’s are compared to trench warfare. Pre-1980’s was a period of challenging industrial relations, this clash and conflict period was a pessimistic era and is appropriately linked to the Great War, where each side attempted not to lose ground or back down. The frontier of control is the root metaphor in this instance. Grant and Mack (2000) argue that the comparable new root metaphor of the new industrial relations in Britain is one of the journey, a voyage, moving away, thus breaking the stalemate of the old trench warfare. By uncovering different root metaphors the authors have revealed different assumptions and perceptions (different ways of seeing). Akin and Palmer (2000) have recorded observations of attempts at communicating a meaning, situation or events to others through a metaphor mechanism. The authors argue that metaphors have the influence to portray what is happening, with the added dexterity to also suggest what actions should be taken. An illustration to support their argument is of a CEO talking in terms of ‘outgunning’ their competitors and ‘kicking butt’ conveying a very different use of metaphors from a CEO who talks of ‘cultivating’ and ‘tending’ to core competencies to augment strategically. Each example has a root metaphor; the first is a military or violent metaphor, while the second is a gardening and nurturing metaphor. Each metaphor defines and reminds those exposed to and unpacking the metaphor, which way the organisational strategies should be viewed together with the expected behaviour to achieve the CEO’s intentions.

Dunford and Palmer (1997) conducted a study of corporate downsizing metaphors, using only published management literature, which sits comfortably within this examination of the root metaphor of a subject category. The centrality and significance of metaphor underpins the core assumptions of this study. Each source was analysed for terms of the metaphors that were used for the aspects of downsizing and the root metaphors that
emerged were then identified and used to categorise the literature. Interestingly, the metaphors were grouped into four categories: root metaphors, external conditions, internal conditions prior to the downsizing, and counter metaphors (metaphors that offer a negative image of downsizing). The external and internal environment root metaphors reveal very different imagery. Downsizing metaphors identified and categorised as the external conditions prior to downsizing highlighted hostile themes ‘the wolf is at the door’ and ‘facing stormy seas’, alongside military and violent themes, ‘declare war on competitors’ (Dunford and Palmer 1997: 99). Winsor (1996) reflects supporting findings, focusing distinctly on military root metaphors, arguing that they are the oldest and most popular organisational metaphor, which has left an indelible mark on business practice and theory. Simply put, the author states:

“the psychological attraction of the military metaphor, then, lies in its direct appeal to the uncrowned leader which resides in the heart and imagination of every middle manager frustrated over the tedious climb up the career ladder. The military metaphor thus spawns a unique reality where managers are heroically potent commanders.”

(Winsor 1996: 34)

The internal conditions prior to the downsizing are concerned with how the organisation manages or survives these conditions, what emerged was unequivocal: the dominant root metaphor was the organisation as a body. The metaphors presented were of being ‘overweight’, ‘portly’, ‘fat’, ‘dead-weight’, ‘unwell’, ‘haemorrhaging’, ‘diseased’, and ‘ailing’ (Dunford and Palmer 1997: 99-100). The authors suggest when root metaphors are used to conceptualise a situation the imagery may be central to the course of action that is then considered to deal with the given situation. Therefore it is important to identify and discuss the root metaphors in a given discourse because they are often deeply suppressed but may act subliminally via a conceptually guided approach. Dunford and
Palmer (1997) argue that metaphors present certain actions as legitimate and essential, and that ultimately the activity becomes depersonalised and actors can distance themselves from their own responses. Again, this is echoed in Dunford’s work with fellow researcher Akin (Akin and Dunford 2000). They also add that this has both negative (managers may not confront the implication of decisions) and positive (metaphors facilitate actions) connotations. Root metaphors are deftly dealt with within this discipline in comparison to IS but this may be because metaphors have become a commodity with a monetary value, bought and sold in organisations and this volume of activity interests researchers who then publish their research.

2.5.2.2 Organisational Studies: metaphor as a qualitative research tool

This category will present illustrations of metaphor used as a qualitative research tool, and to explore a research tool employed by a significant number of researchers, practitioners and consultants (Neilson 1992; Marshak 1993; Akin and Palmer 2000; Barnett 1996; Broekstra 1996; Chia 1996; Clegg and Gray 1996; Inns and Jones 1996; McCourt 1997; Alajoutsijarvi, Eriksson et al. 1999; Akin and Palmer 2000; Gibson and Szellmer-Bruhn 2002; Haslam, Postmes et al. 2003; Lamberg and Parvinen 2003)). The positive aspects and limitations of using metaphors as a qualitative research tool will be discussed throughout this section. The section finishes with Akin and Palmer’s (2000) potential hazards to be aware of when metaphor is used to introduce change in an organisation.

In her discussion regarding this category, Inns’ (1997) taxonomy offers Cleary and Packard’s (1992) work as a model exemplar. They argue that an individual’s interpretive framework can be understood by the metaphorical language they use. Consultants, they further argue, are able, through discourse analysis, to reveal ‘real meanings’ behind what is being spoken within organisations, and once identified or exposed these findings can ultimately contribute towards managerial strategic planning (Cleary and Packard’s 1992). There are also ambitious claims made that corporate culture can be identified through metaphorical language (Pearce and Osmond 1996). The belief that metaphors can be
interpreted in a simplistic manner by external change agents consultants who can understand individuals’ feelings, emotions and assumptions better than the subjects themselves warrants a serious debate. The potential ambiguity for errors is denied and the metaphor is simply viewed as a tool (a qualitative research tool?), because of a real pressure to demonstrate a practical value or monetary tag in a commercial environment.

A potential illustrative exemplar of this suggested ‘conceited consultancy’ style is shown in a study by Pearce and Osmond (1996) who developed an ALP (Access Leverage Model of Change Management) model to increase the change agent’s cultural awareness when facilitating change. The ALPs are critical aspects of the culture that can impede the introduction of organisational change efforts. They do not suggest metaphorical analysis but the development of one metaphor to represent the target culture. In response to criticisms to the simplification of this whole process they reply that a single metaphor must have a reasonable level of sophistication and it provides guidance to the overall mindset of the target culture or domain. The authors curiously summarise with a metaphor stating that introducing change into an organisation is comparable to introducing a virus to an organic cell where there is resistance but not immunity to change, ‘one sure way to bring a smile to anyone involved with change’ (Pearce and Osmond 1996:25). In response to the notion that organisational culture could be simplified in such an almost naïve manner comes with a warning: it is arguable that organisational actors do not have ready access to their unconscious choice of metaphor and equally neither do the managing consultants or practitioners (Inns 1997). Akin and Palmer (2000) propose that there are six ‘broad traps’ that require management and must be avoided when using metaphors as a change agent tool. The potential ‘traps’ are list below:

- **Overextended** – this occurs when features of a metaphor are applied in an inappropriate way for the situation under study. The example given is that if a decision has been made that the organisation is a machine, it is only like a machine in certain respects - it will not make much sense if an interpretation of this is that it is
under guarantee and can be returned to manufacturer if you are dissatisfied with its performance.

- **Lack sufficient fit** – a metaphor may be applied to a situation that lacks sufficient fit, so causing a meaningless, confusing comparison – the example given by the authors is that if a team is compared to an apple, there is no immediate characteristics that are portrayed.

- **Lack sufficient familiarity** – in contrast to the latter warning, this use of metaphors in an appropriate manner is when a metaphor is applied that may not make sense to those who are not familiar with the major characteristics. The example given by the authors is likening an organisation to a microchip.

- **Metaphors can carry ambiguous meanings** - the trap here is that when using a metaphor it may be assumed that everyone involved will have the same understanding of the metaphor. The authors offer the example of a bee to encourage innovation. The image is of the workforce as busy bees cross-pollinating innovative strategies and ideas from multiple and unconnected sources. However another image that can be drawn from the use of that metaphor is one of a chaotic situation with the workforce buzzing from one idea to another in an unstructured, undirected manner.

- **Changing of organisational metaphors** - In attempting to change organisational metaphors there is a major warning from the writers that managers and change agents fall into the trap of believing that they can make these changes at will. They warn that some metaphors take better than others; an appropriate metaphor of a bone graft is given to embellish this point. Metaphors do vary in power and strength, and there are some embedded metaphors that are persistent and are impossible to eradicate. A number of reasons are given why this may be the case:
  
  ➢ The creative potential will determine its ability to dominate; there may be an evocative element of the metaphor, which immediately creates a lasting impression on the listener.
The most interesting factor for the phenomenon under study is that it is not the metaphor itself which wields the power, but the orator, the enunciator who produces the influence.

A situation may already be dominated by a particular metaphor, and redefining that situation with a new metaphor will be problematic. Metaphors may be embedded through cultural and ritual practices; to enable metaphors to be changed may require attention to cultural practices and introducing cultural changes.

- **Effective managers are able to utilise multiple metaphors** - The authors argue that there is a confidence that effectual managers are able to utilise multiple metaphors to understand and manage organisational situations. Akin and Palmer (2000), however, claim but do not explain in any detail who it is that all of a sudden believes that effectual managers have the skill to utilise metaphors when introducing change. They argue that using a limited range of metaphors can lock managers in by narrowing the options open to them. This narrow use of metaphors has repercussions and can reflect the narrow view held of the organisational landscape. The trap is that metaphors can illuminate a situation but can also direct attention away from other interpretations of the same situations (Yoos 1971; Lakoff and Johnson 1981; Bergmann 1982).

Table 2.2.4: Traps to avoid when using metaphor as a change agent (*adapted* Akin and Palmer 2000)

2.5.2.3 Organisational Studies: metaphor as a generative tool for creative thinking

Grant and Oswick (1997:2) contribute to the notion, alongside Drakopoulou Dodds (2003) and Arnold (2003), that there is little dispute about metaphor having ‘generative quality’. As with many other writers on the subject of metaphors, they universally announce that metaphors enable the transferring of the knowledge of the familiar to new and unknown subjects and environments. They claim that metaphors are ‘generators of new meaning’ (Grant and Oswick 1997:2) and can be used to bring new perspectives of organisations into the OS domain. The authors also quote Schon (1993) as having termed
the 'generative' qualities of the metaphor. The authors question the value and relevance of the generative contribution of the metaphor, arguing that there is nothing new about the application of metaphor in OS and questioning whether it actually increases the understanding or knowledge of the subject under research. The authors suggest that metaphors may constrain knowledge and if science is about rigour and precision then a tool that is applied in a figurative sense cannot be of any use in a scientific investigation unless the metaphor is quantitative in nature. Grant and Oswick (1997) interestingly open the debate of the relevance on metaphors with Ortony’s (1993:2) non-constructivism position on metaphors that has a valid role in this section by introducing an alternative perspective.

“If metaphors need explaining at all, their explanations will be in terms of violations of linguistic rules. Metaphors characterise rhetoric not scientific discourse. They are vague, inessential frills, appropriate for the purpose of politicians and poets, but not for those of scientists.”

(Ortony 1993:2)

Metaphors, it is argued, are put to use without a full understanding of their limitations (Akin and Palmer 2002) and relevance. Furthermore, there is little reference to the appropriate fitness of the metaphors selected, but instead the choice is a personal cognitive one of the researcher, change agent or practitioner, and it may be that the choice works for one individual but not for another (Grant and Oswick 1997). This may be described as a positivist perspective that is contrary to the fundamental research direction of this thesis. However, these opinions highlight certain limitations of metaphor when looking through an alternative research lens.

Morgan (1986), Palmer and Dunford’s (1996) studies are included as valid examples of generative metaphors. Consultants particularly use Morgan’s (1986) work when creatively viewing situations via alternative perspectives. Palmers and Dunford (1996)
extract organisational metaphors, which are then used as templates for organisations to reveal cultures, management styles and organisational structures. The use of metaphors in this instance is to instigate creative thinking, which Kamoche et al (2003) highlight is usually at times of economic turbulence and increasing periods of complexity. It is at these times that the more novel strategies emerge (see Table 2.2.5). There is a body of research concerned with the changing structures, multidimensional and dynamic nature of organisations and understanding this nebulous virtual form through a musical jazz metaphor (Hatch 1999; Kamoche et al 2003). The metaphor claims to make an imaginative contribution and that ‘performing jazz could help us to generate a re-description of organisational structure’ (Hatch 1999:77). The strands of interest that emerge from this research study are the phenomena of improvisation which can be broadly defined, in this instance, as the conception of actions or activities as they unfold in real time. The improvisation is the drawing from cognitive resources and the instantaneous engagement of these activities to adapt to the changing situation. This concept has implications for a number of organisational phenomena such as team working, virtual working, product development, and organisational change. The jazz metaphor maps to this concept because it too is a process improvisation, so there is an aptness that researchers draw on. The OS literature is replete with illustrations of the use and application of novel metaphors such as jazz, how appropriate a fit and how justified these metaphors are is both questionable and personal in each case (Akin and Palmer (2000). This concern could also be directed at the metaphors that have emerged from the case data of this thesis but in justification of those metaphors they have not been selected and then imposed upon an unwitting environment, rather they have been observed in-situ and this phenomenon has been interrogated. Table 2.2.5 displays a list of novel but generative metaphors illustrating a diverse list of dealing with an equally diverse set of organisational issues.
<table>
<thead>
<tr>
<th>Metaphor</th>
<th>Subject Matter</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jazz</td>
<td>Organisational theory</td>
<td>Hatch (1999), Neilson 1992</td>
</tr>
<tr>
<td>Sports, family, community and military</td>
<td>Teamwork,</td>
<td>Gibson and Zellmer-Bruhn (2002)</td>
</tr>
<tr>
<td>Drama</td>
<td>Intra-organisational collaboration</td>
<td>Bryant (1998)</td>
</tr>
<tr>
<td>Jigsaw</td>
<td>Creative thinking</td>
<td>Neilson (1992)</td>
</tr>
<tr>
<td>Ice skating</td>
<td>Creative thinking</td>
<td>Neilson (1992)</td>
</tr>
<tr>
<td>Team s</td>
<td>Group working</td>
<td>Klimoski (1994)</td>
</tr>
<tr>
<td>Car/animal</td>
<td>Management and team leaders</td>
<td>Oswick and Montgomery (1999)</td>
</tr>
<tr>
<td>Music</td>
<td></td>
<td>Kamoche et al 2003</td>
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<tr>
<td>Parenting</td>
<td>Entrepreneurs</td>
<td>Cardon et al 2004</td>
</tr>
<tr>
<td>Roads</td>
<td>Strategic Management</td>
<td>Martinsons (1995)</td>
</tr>
<tr>
<td>Umbrella</td>
<td>Business processes</td>
<td>Czarniawska-Joerges (1992)</td>
</tr>
</tbody>
</table>

Table 2.2.5: Examples of metaphors used as generative tools for creative thinking in both OS and IS
2.5.2.4 Organisational Studies: metaphors as a hegemonic tool to influence perceptions and interpretation

Unlike the IS discipline, there is more published literature available that is concerned with metaphor and organisational studies but this category is possibly still weakly illustrated. De Cock (1998) suggests that organisational life has gained more interest in the recent years with organisational researchers becoming increasingly more perceptive to the detail that organisations are entwined and integral to discursive fields and cannot be separated. Furthermore, the idea that language has a role in the structuring reality is also gaining popularity in a wider social studies audience. De Cock (1998) further adds that discourse can restrict and limit what is said about the phenomena in the research domain but it is also empowering certain organisational actors to question and query that phenomenon. In using a particular discourse, it is further argued, organisational actors not only secure the justification to speak but also to challenge existing power relations. De Cock (1998) states that through particular change discourses (management presentations, news updates, informing meetings) senior management can attempt to define the normative behaviour expectations of employees. This argument is further supported and illustrated by the empirical data that has been collected for the purpose of this thesis - senior management exposed the employees to persistent hegemonic metaphors to avert user resistance. Coupled with Inns’ assertions (1997) that metaphors are used to alter perceptions, nurturing emotions in an exploitative manner, ‘it involves the deliberately shaping perceptions through persuasion and influence, often unknown to the participants’ (Inns 1997: 313), this presents a very powerful management tool. The author (Inns 1997) reports that two strands of research are identified: the first is the descriptive and critical accounts, which analyse how others use metaphor in a specific contextual domain; the second strand is more typical in its promotion to senior management. There are some reports of the use of evangelical metaphors being used by certain companies to evoke commitment and devotion from employees. ‘This strand is more likely to be wearing ‘blinkers’ with the interpretation of the metaphor and the linkage to the problem area as being a simplistic one without an ambiguity’ (1997:325)
2.5.3 Information Systems

This section will review and consider only IS journals that have published pertinent metaphor research. Firstly, ‘The Information and Organization’ journal, whose first issue was published in January 2001, was the newly reformed Accounting, Management and Information Technologies (AMIT) that had previously dealt with the research questions at the core of information systems and which has also formed a rich source of IS and metaphor research. Robey (2001: 2) who was then Editor-in-Chief stated that ‘Information and Organization will continue to serve the information systems community and reach towards the organisation sciences’. Using the IS journals as a guide to the available published metaphor research somewhat takes away the pressure of which author’s research has been allocated to which discipline: the decision has been made by experienced and notable academics. The selection of Schulze and Orlikowski’s (2001) review of contemporary discourse associated with metaphor’s role in the relatively new phenomenon of virtual organisation is hugely complementary in attempting to construct an IS backdrop to position Inns (1997) taxonomy and theoretical framework. The study is extensive, with the authors (Schultze and Orlikowski) setting themselves a number of tasks, the first one being, using Morgan’s (1986) two-step strategy of diagnostic reading, to identify and interpret the imagery and rhetoric used with the metaphors used to describe virtuality. This is followed by a critical examination of the different interpretations produced by such readings of the various metaphors found. They review practitioner literature in an endeavour to understand the kind of reality that is being incited and imagined within organisations when virtuality evolves from a concept to reality. Information Systems become the infrastructure, the key enabler, the ‘essence of virtual organisations’ (Schultze and Orlikowski 2001). This research of the use of metaphors in understanding and constructing the new phenomenon of virtual working offers a powerful insight into how practitioners are then making sense of this new concept (virtuality) that has been thrust upon them.

What makes this review complementary to this thesis is the importance that has been placed upon the theorisation of metaphor, which has been drawn upon to support their analysis. As previously stated, metaphor is a multi-disciplinary research tool and when
theorising such a complex phenomenon as metaphor, one can draw upon a simplistic analogy such as a figure of speech. It becomes impossible to place any rigid boundary from which to garner theories. Lakoff and Johnston (1981) report on different types of metaphor, for example, orientation or spatial metaphors (negative or positive), ontological, personification, and structural metaphors. Putting forward Schultze and Orlikowski’s (2001) review as an exemplar when conceptualising a structure to position pertinent IS metaphor research does not come without ambiguities. The authors chosen methodology for analysis of their selected literature is that of Morgan (1986) who is renowned for his work in the OS discipline, which can be seen as a marker of how closely entwined the two disciplines are.

A second study from the same journal (Information and Organization) is similar to the first, in that both use metaphor as an analytical lens. However, this study’s perspective is not through practitioner literature, as is the case with Schultze and Orlikowski’s (2001) study, rather it is conducted through the ‘parlance of information systems practitioners’, (Ramiller 2001:129) the analysis of IS practitioners’ narrative.

A notable difference of the two studies is the lack of theorising and or problemising metaphor in the Ramiller (2001) study. An interpretive study from forty two interviews from a diverse group of thirty six IS professionals ranging from CEOs and senior systems consultants to senior editors of information systems trade journals. It focuses on the verbal representation of the practitioners in the field as they characterised their personal opinions and those around them of the dynamic nature of these new enabling technologies. The author adds that the study reveals a contrast to the ‘rational manager’, who is often commonly implied in the IS research discipline as someone who rationally applies innovative IS in response to business solution needs, with images of information executives that are fraught with fear of failure and the associated social response, almost in real-time scenarios. This makes this study significant with the potency of such empirical research (Ramiller 2001). As such, this study is equally important in constructing a backdrop to place the pertinence of IS metaphor research against and presents an equilibrium with the first study. Lakoff and Johnston’s (1981) work on the pervasiveness of thought and expression is given a cursory mention when Ramiller
(2001) justifies the use of metaphors in his research and there is little other theorising of the metaphor phenomena. In highlighting this factor, it should be taken as just that, and not a judgement on what is an informative and important study, especially for the IS practitioners. The focus of the major analysis is upon the interviewees' use of metaphors to express their sense-making and understanding of what is 'good and bad, smart and foolish, proper and improper on information technology innovations' (Ramiller 2001:131). This analysis of metaphors aids how the interviewees (who are senior IS executives and decision makers) organise their thinking about sense-making and the understanding of innovative technology. The emphasis of the study is on the interpretation of practical industry language and discourses on IS innovation, and there is little literary support or evidence that has been produced regarding the powerful nature of metaphor and its ability to structure reality and aid understanding. Furthermore, a blind eye has been turned to the ambiguity and constraining aspects of metaphor (Ramsey 2004). A study from 'The Journal of Strategic Information Systems' also looks at organisational language but focuses upon the poor use of metaphors observed in a Business Process Reengineering (BPR) failure (Sarker and Allen 1999).

The third study moves towards the role of metaphor in user centred design (Fernandes Silva 2002). Recent database applications are typically designed for non-expert users, and therefore they need to be equipped with a diagrammatic representation of the database diagram. They also implement user-friendly interfaces, which facilitate user interaction with the system by individuals of different abilities. A 'graphical notebook' metaphor is exploited because the authors claim that the use of icons and visual metaphors attracts the user's attention and stimulates curiosity (Fernandes Silva et al 2002). This study has been sourced from the 'Information Systems' journal in a continuation of the initial concept of using IS literature to guide the selection process of which IS articles are pertinent for the conceptualisation process.

The first study within this conceptualisation process of the metaphor within IS turns towards the problemising of virtuality. Through the analysis of metaphor found exclusively in IS practitioner's literature, knowledge was sorted to understand the kind of reality that is being incited and imagined within organisations (Schultz and Orlikowski...
The second study is an analytic focus upon IS practitioners' use of metaphors in their language, used to express their sense-making and understanding of IS innovation (Ramiler 2001). Both previously highlighted studies attempt to interpret the metaphors in use, be it in the verbal or written word, whereas the third study explores the role of metaphor in user centred design (Fernandes Silva et al 2002). Metaphor could be described as multidisciplinary and within each discipline could further be described as multifaceted. This complexity is apparent almost immediately, once a review of the literature has been conducted and selected studies reflect the different roles of metaphors. What can be understood from these highlighted uses of metaphor in IS is that metaphor is a flexible and valuable research instrument that is commonly used. It enables the researcher to problem-solve, access problematic situations through alternative perspectives when critically evaluating metaphors in use. Metaphor opens an often closed door or window into what organisational actors are covertly trying to hide, evade or simply not able to vocalise. That said, metaphor as a research facilitator has no boundaries and can and is used in most disciplines.

2.5.3.1 Information Systems: examination of the root metaphor of a subject

As previously reported, the root metaphor highlights the dominant perspective or way of 'seeing'. The root metaphor often then structures the thought process that can be observed through language, images or symbols that are predominant within the research location. There are a large number of examples of this way of 'seeing' found in the Organisational Analysis discipline whereas the IS arena appears sparse, with less distinct examples. However the case study that will be drawn upon to illustrate the examination of the root metaphor is the Sarker and Lee (1999) BPR failure study at a US telecommunications company in the broad range of the early 1990's. The BPR failure happened as a consequence of diverse critical problems, from inadequate communication channels, hidden agendas and implementations issues, to the 'poor choice of metaphors in the organisational language' (Sarker and Lee 1999:83). The BPR case study is a fascinating one, the more so because the whole lifespan of the project is reported on with
extremely potent commentary from the constant conflict of key staff members of the company with the re-engineering team. The whole BPR project was awash with complications and an initial step in the redesign process was division of the company into ‘process chunks’. Then an information gathering process began in earnest with the re-engineering team conducting 1500 interviews with the telecommunications staff. The next process was to conduct a ‘problem identification root cause analysis’ (Sarker and Lee 1999:86) whereby the fundamental causes of problems for each process chunk were identified. The outcome of this process was an immediate backlash from the company employees against the use of ‘aliened forms of symbolism’ (Sarker and Lee 1999:86). The metaphors identified from the re-engineering process related ‘speak’ were ‘quick hits’, ‘low hanging fruit’ and ‘hatchet in the head’. The root of these metaphors was driven by a major objective of the re-engineering process, job reduction. Employees began to react very negatively when they realised that the re-engineering consultants, when they referred to a ‘low hanging fruit’ or a ‘quick hit’, actually meant they were ‘hitting’ people’. The terminology was changed to ‘immediate opportunities’ but the damage had been done. These metaphors indicate the hidden beliefs and objectives of the overall project that the top management advocated, downsizing through re-engineering type and the number of people that could be eliminated through the new IT enabled processes.

2.5.3.2 Information Systems: metaphor as a qualitative research tool

Abusson (2002) reports on a method of analysis whereby metaphor is used as a qualitative research-thinking tool, to interpret findings from a qualitative field study. The author adds that as researchers we are challenged to make sense of the world that we see - not just to describe the situation but to theorise it. Analogical mapping using metaphor has been effective in producing a conceptual framework and as a communication aid (Abusson 2002). This study has been included within this part of the taxonomy because it highlights the specific use of metaphor as a qualitative tool, when more often this factor is overlooked, assumed or ignored in studies. It should also be noted at this point that the
study originates from the educational change discipline and is published in a qualitative journal not from the Information Systems discipline. There are a lack of IS studies to illustrate this category, demonstrating the need for this thesis and further research in the area. Nevertheless, for the majority of qualitative methods of research, ‘language is at one and the same time subject and meaning’ (Schmitt 2005:358), and, as Lakoff and Johnson (1983) argue, the use of metaphors is an unconscious process and offers hidden insights and opinions that individuals are not aware they are revealing or may be consciously concealing. Metaphor analysis of organisational language is therefore popular among consultants and practitioners and will be included in the following section that deals with OS studies. However, it poses a challenge for this IS section. No defence is made for including the Drakopoulou Dodd (2002) study within this category, it is purely a personal choice because the study is both relevant to the overall thesis subject matter (use of metaphor to overcome user resistance) and not obviously under the OS discipline.

Drakopoulou Dodd (2002) developed a grounded cultural model of US entrepreneurship by analysing which metaphors are employed by the entrepreneurs to give meaning to their enterprise. This study differs in the notion raised of whether the metaphors emerge innocently rather than being imposed by dominant managers. This alternative perspective is rarely aired when the normal practice is to view metaphors as a window in, and the ability to offer hidden insights as previously mentioned. Again in this study there is the cursory glance at Lakoff and Johnston’s (1982) theory of the role of metaphor in cognition, in which we think and act metaphorically to make sense of how we think and act.

In using entrepreneurs as part of the research domain, Drakopoulou Dodd (2002) consciously endeavours to eliminate the practice of reading the unconscious use of metaphor, because she argues that entrepreneurs are the main creators of meaning within their environment, and this study is concerned with metaphors created by the dominant players, whether innocently or deliberately. This study will be referred to in more detail when the case data of this thesis is dealt with, as there is a resonance with a similar theme, the act of the deliberate development of metaphors by dominant organisational actors to influence, which requires further exploration. Drakopoulou Dodd’s (2002) study
has one eye on the deliberate creation of metaphors but in framing her research looks at life and business narratives as ‘fertile ground for harvesting analysable data’ (Drakopoulou Dodd 2002:522) from the entrepreneurs. This qualitative study using metaphors has enabled in-depth, distinct findings, highlighting pains and pleasures of nurturing and the commitment involved in the act of entrepreneurship.

However, there is a contradictory situation happening in the OS discipline, as will be reported in the next section, as there are numerous illustrations of metaphor as a qualitative research tool available. The reoccurrence of questioning why this is, is possible because of researchers’ use of language when defining the research domain, and placing the research within organisations allows for a broader area of research than channelling the research to a relatively adolescent and distinct discipline such as IS.

2.5.3.3 Information Systems: metaphor as a generative tool for creative thinking

Inns (1997) believes that this category underpins all the other categories and she questions the validity of allocating it an exclusive category. Though this is a compelling argument, there are some authors that make distinct use of the generative metaphor (see Table 2.2.5). As demonstrated throughout this thesis the metaphor is multifaceted and this reinforces this fact. Kamoche et al (2003) go as far as suggesting that there is an unrelenting search for new ideas and metaphors in approaching problems associated with organisations and a certain creativity is emerging. Marshak (1993:45) suggests that ‘metaphors are often the medium for understanding and presenting ideas, insights and intuitions.’ Drakopoulou Dodd (2002:521) adds that metaphors ‘can create realities’. Neilson (1992:5) searches for a metaphor for strategically shaping the organisation and explores the jigsaw metaphor, the ice-skating metaphor and the jazz metaphor because ‘new ways of thinking are required’.

To differentiate this category from the previous one there has been some attempt to actually locate studies that have also differentiated a use of metaphor. This exercise reveals a number of researchers whose use of metaphor could also place them in other
categories as well, so endorsing the ongoing fact that metaphors are complex and cannot be easily defined. Arnold (2003) uses a Janus\(^1\)-faced metaphor as a rhetorical and analytical device in her research on the changing role of technology in organisations. The application of metaphor for this research, the author claims, reveals concepts that otherwise would remain obscure, are concealed if using other interpretive methodologies which would also sit comfortably within the qualitative research tool category. That said, Arnold (2003:233) actually stated within the text that ‘metaphor may be used not just as a poetic fiction or embellishment, but as a \textit{generative} device as an ontological strategy and as an interactive means of communication’. Another poetic theme is Inns and Jones’ (1996) work where they compare the attribute of creativity and imagination that metaphors bring to that the poet attempts to provide through vivid images in relation to emotions and perceptions. The authors argue that these poetic procedures are replicated when metaphors are used within an organisational setting. This poetic theory is contested by those organisational scientists that require a more rigorous research function from the metaphor that will form a relevant analytical framework (Grant and Oswick 1997). However, this steers the discussion away from the IS field, reiterating the problematic nature of defining metaphors and, for that matter, unravelling the two disciplines, IS and OS. Furthermore, there is a limited range of studies from the IS discipline to illustrate this category, especially in comparison to Organisational Studies.

\subsection*{2.5.3.4 Information Systems: metaphors as a hegemonic tool to influence perceptions and interpretation}

In returning to the fundamentals of the taxonomy, Inns (1997) highlights another facet of hegemonic language, that it is often disguised by creative language. This phenomenon is illustrated implicitly by the empirical case data of this thesis. In reiteration, the author further adds that there is often a more sinister and decisive function of using metaphors as hegemonic tools and again we return to Stephens and Loughan’s (1994) study to further expand this perception. Their study reported on five CIOs’ use of metaphorical language when communicating with management without overuse of technical jargon. The

\footnote{Janus is a Roman deity cursed and blessed with two faces, with no option other than to look in two directions at once, backwards and, at the same time, forwards.}
inclusion of this study is because of its comparison with the case data of this thesis; there are similar data collection methods, observations of senior management at work dealing with decision-making, and instant cognitive responses were recorded\(^2\). However, the five CIOs from Stephens and Loughan's (1994) study were considered in a 'real-time' work situation but for just one week, which is a modest time for both the researcher and research participants to familiarise themselves with the process. In comparison, the research for this thesis could be described as in-depth, with the three-year study capturing not only the use of metaphors but also the causal factors of how the metaphors evolved. In addition, the effect and consequence of metaphor upon the recipients was more crucially analysed. The reoccurring characteristic of this research again emerges when the search for pertinent studies to illustrate the hegemonic tool to influence perceptions and interpretations was conducted. There is an obvious lack of published studies on this subject that can be appropriated to the IS discipline. A simple reason for this may be that most metaphor research studies are dealing with language associated with organisational issues in general rather than exclusively isolating IS issues.

2.6 Information Systems v Organisational Studies

Inns (1997) suggests further areas that require metaphoric exploration, which is the understanding of how individuals make sense of the world individually, collectively and emotionally and act accordingly, adding that it would be beneficial for all disciplines that include the study of human behaviour. Further in-depth exploration is required of why some interpretations and perceptions of the use of metaphors become collectively established and dominate in organisations. This leads to an investigation of leadership, power, and politics of organisations via an alternative lens. An understanding of where core root metaphors evolve from and finally become embedded would be hugely beneficial. The focus of this thesis study aims to contribute to this need for further exploration of research, which focuses on why and how the collective interpretation of metaphoric expression becomes established. Inns suggests that further understanding of the 'mapping' between two conceptual domains, how we are able to understand

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\(^2\) There is a minimum of published research regarding senior management's use of metaphors in a 'live' situation, researchers often rely upon interviews published in industry literature when observing the role of metaphor to influence
something in terms of something else, how these connections are made, and a new look at
the links between language, thought and meaning is required. A final suggestion for
further exploration is metaphors potential as an 'empowering tool'; dominant, guiding
metaphors do not easily change so an awareness of them is central to understanding
ourselves, understanding our culture and the world at large.

Throughout the exploration process, Organisation Studies score high in the application
and illustration of metaphor. A primary reason for this may be a commercial one as
consultants or change agents who have a dual role as academics amass empirical data
relating to metaphor. A common theme from the studies reviewed is observing
organisational metaphoric language offers insights into how organisations behave (Pearce
and Osmond 1996; Lakoff and Johnson 1981; Neilson 1992; Marshall 1993; Barnett
1996; Broekstra 1996; Chia 1996; Clegg and Gray 1996; Inns and Jones 1996; McCourt
1997; Alajoutsijarvi, Eriksson et al. 1999; Akin and Palmer 2000; Gibson and Szellmer-

2.7 Limitations of metaphors in research

As suggested above, the metaphor appears to be a powerful tool for organisational
analysis, both in the practical and theoretical application but alongside these assertions of
the usage of the metaphor are also reservations and the ambiguities that academics also
warn against. The metaphor relies heavily on the identification of similarities between
non-identical things, so it could be said that when using metaphors to understand one
concept through another a de-emphasising occurs, (Hatch, 1997) and with Lakoff and
Johnson (1983) arguing that 'human thought process are largely metaphorical' it is
therefore important for us to understand both the strengths and limitations of metaphor.
It is only through critical reflection that we are able to clearly recognise the strengths and
limitations of metaphor. To illustrate, Morgan (1993) states the metaphor allows us to
connect or see similarities by attempting 'to understand one element of experience in
terms of another', but he warns that his metaphor of organisations as machines ignores
the human aspects of those organisations, which is also a strong argument against the

or persuade.
Grant, Keenoy and Oswick (1998) further add that a possible implication of Morgan's work is that 'organisation is transformed into a supermarket of metaphors which customers can visit to purchase and consume its conceptual wares according to their brand preferences and purchasing power' (Alvesson, 2002). Moreover the same 'supermarket purchased' metaphor may map very differently onto organisational events and present competing approaches.

Alvesson (2002) adds that from a traditional scientific viewpoint, metaphors cannot be translated into precise objective language and so elude rigorous investigation; it is also argued that metaphors can constrain knowledge (Grant and Oswick 1996). If one holds the opinion that science is proven with accuracy, precision and hypothesis, and is quantitative in nature, how then can metaphors that are said to be a cognitive process and an exchange of experiences and qualitative in nature also make a comparable scientific contribution? This debate is ongoing and has critical implications to many research disciplines (Alvesson, 2002; Grant Keenoy and Oswick 1998). Alvesson (2002) further advises caution in terms of the related difficulty in the 'catchiness' problems that some metaphors can create, especially as the author reminds us as the current popularity of metaphors. This may easily steer to the excessive use of 'seductive metaphorical expression' (Alvesson 2002) at a superficial level, disregarding the development of robust analytical metaphors that may actually be of use. In some instances an oversimplification may follow if too much emphasis is placed upon one metaphorical image. The metaphor is then seen to guide and coerce in one direction, not producing a 'rounded' set of insights, but rather a 'blinkerered' view. In emphasising partial characteristics metaphors can then aggressively place other interpretations in a peripheral position.

2.8 Conclusions

As previously stated, the anchoring discipline for this whole thesis sits within IS. The metaphor review reveals a gap in the available published research of any evidential supporting literature regarding the use of metaphors to coerce certain users into compliance with management aims and to avert IS resistance. This gap is also noticeable
in the OS field. An overwhelming factor when conducting the literature review was the infinite amount of research available on the phenomena of metaphor.

Predominantly the literature is concerned with how metaphors are used as a ‘way of seeing’ by academics and practitioners. This ethnographical study differs in that metaphors are dealt with in a more descriptive manner, enabling a rich insight into the phenomena under study. Inns’ (1997) ‘preliminary taxonomy’ was selected as an existing framework to structure the literature to make sense of the complex and various uses of metaphor research, highlighting areas of underdevelopment, common trends, themes, assumptions and biases. The terrain of Inns’ (1997) work is not the application of metaphor in organisations but a review of how metaphors have been utilised, applied and facilitated in OS research. In this chapter the two disciplines were dealt with in isolation and categorised against an adapted taxonomy. The following chapter reviews user resistance and user participation literature. These areas of research form a further dimension of this study, understanding users reactions in IS implementations.
3 User Resistance and User Participation in IS: an unravelling process

3.1 Introduction

This chapter reports and explores the literature on user participation and user resistance. The ISD process is a multi-faceted one which requires deconstructing to enable any structured investigation, the two user constructs selected, user participation and user resistance, facilitate a focus upon users interaction throughout the IS developmental process and a further focus upon the reaction and any resultant behaviour of users because of the IS implementation process. This then is the landscape with which to analyse and identify any/the use or application of metaphor as a tool to manage user resistance. The relevance of this activity is to substantiate and present further evidence regarding the lack of examples and incidences of the metaphor in this role as observed in the empirical work of this study. To enable an ordered trawl through this miasma of complexity and conflicting IS literature; a fairly simplistic structure has been adopted. In posing fundamental and straightforward questions, such as 'What is resistance?', 'What is user participation?' and 'What are the strategies for overcoming resistance?', the included literature has been unravelled and categorised to enable these questions to be answered by the academic community. The chapter concludes with identification of possible gaps and limitations of existing participation and user resistance literature selected for the purpose of this study.

3.2 The confusion and ambiguity of IS user terminology

The unravelling process cannot really begin until reference has been made to the complexity of definitions of labels in the user resistance and user participation IS literature and more distinctly defining the nebulous user. Confusion and ambiguity of definitions in this literature grouping is ubiquitous and contributes hugely to the yet unresolved and mounting debate that is being played out in the IS arena. Clarification is
urgently needed regarding definitions that are currently misused, misplaced, and misrepresented (Barki 1989; Ives and Olson 1981). The definitions that fall within this debate and require attention include the user, user resistance, user involvement, user participation, user satisfaction, user attitude and user participation. In order to allow full understanding of user resistance and user participation as isolated concepts, an unravelling process of the related complexities of user activities is required. Therefore, although this chapter focuses predominantly upon user resistance and user participation, since these constructs are totally entwined with other user related activities, these are also considered within the chapter. There is a considerable amount of published theoretical work on the subject matter. This has helped academics and practitioners to achieve some understanding of the subject matter, but, surprisingly, the empirical data associated with the topic is even suggested by some authors to be fragmented and the collective findings incongruent, because of the use of disparate research tools (Cavaye 1995). This author’s work is cited throughout this chapter even though it has been published over a decade ago, Cavaye’s (1995) work continues to endorse current research findings indicating that a research issues raised have not yet been addressed (see Howcroft and Wilson 2003; Symon and Clegg 2005; van Lente 2006). Cavaye (1995) suggests that individual papers should discuss separate issues, individual factors, but she acknowledges that it is difficult to define the isolated construct because each concept has many dimensions and in simple dealing with one may disregard significant relating features of others. These authors (Barki completed the seminal article in 1989) are constantly cited in this ongoing debate on definition (cited 93 times on the www.scholar.google.com resource) and no excuse is made for inclusion of this article, which was published almost sixteen years ago – indeed, the fact the article is still so widely cited is possibly indicative that the issues raised by the article are ongoing. This user phenomenon requires a lexicon definition; the academic world must, in conjunction with practitioners, fulfil its role and contribute its analytical knowledge to what is a continuing problematical situation. Barki (1989:53) famously argues, as previously mentioned, for the definition and separation of user participation.
They define user participation as:

“a set of behaviours performed by users in the system development process”

They define user involvement as:

“a subjective psychological state reflecting the importance and personal relevance of a system to the user”

A user, they suggest, is involved when he or she considers a system to be personally relevant. Furthermore, the IS community needs to realign its present thinking with regard to the current conviction of what user involvement actually means. Barki (1989) goes as far as actually advocating that what is currently perceived to be user involvement should be relabelled as user participation, and existing research on this subject should be reconsidered through this new lens of user participation. The authors do not go so far with regard to their user involvement definition, suggesting that a definition comparable to that in use within other disciplines should be adopted, an effect of which would be to realign the IS community with other research disciplines (Barki and Hartwick 1994). The general definition currently in use within the IS community is that user involvement refers to the level of participation in the system development cycle by users, and that the process can be measured by the activities the users execute. Their study, however, highlights theoretical, measurement and methodological problems, which prevent definitive conclusions regarding the benefit of user involvement being reached. The authors further add that although there has been extensive research in the area regarding definitions, the findings remain both descriptive and shallow, and the authors observe, through exploration of previous studies, that once the concepts of user participation and user involvement have been differentiated they should be empirically determined with relevant research. Argument is made that a major factor weakening the debate is a lack of existing rigorous and relevant empirical evidence to support this differentiating argument. Cavaye (1995:311) is one of a growing body of academics who argue that the literature
focusing upon this phenomenon is "fragmented and presents inconsistent results". Although existing findings are not worthless, when viewed in isolation the contribution is fragile, and it is therefore recommended that the available literature requires fusion and structure to extract a real richness (Cavaye, 1995). Livari (2004:631) contributes proficiently to the debate but commits the common inaccuracy of not stating the terms of reference for her study, producing instances of terminology ambiguity. ‘User involvement’ is a very vague term, and can be interpreted to range from active user participation in the design process to the involvement of users as mere providers of information and as objects of observation” that Barki (1989) and Cavaye (1995:323) actually highlight “the fact that the terms user participation and user involvement have often been user interchangeable” is continuing to cloud the research process of this subject.

3.3 ‘What is user resistance and why does it happen?

“Resistance is a complex phenomenon which defies simple prescription”

(Hirschheim et al 1988:398)

Individual users of IS often respond in different ways to technological changes, ranging from total rejection, through moderate rejection of some of its functionality, demonstrated resistance, passive resistance, or reluctant acceptance, to full acceptance. Resistance is therefore a reaction, a symptom, an indicator of users attempting to realign the change process, and if it is not addressed effectively it can undermine the system implementation efforts and result in failure. A better understanding of resistance may consequently lead to better strategies for managing system implementation.

3.3.1 Why does user resistance happen in IS?

The role of this section is to explore why resistance occurs. What triggers convert a system user to a resister? The IS community certainly has a voice on this matter, but
Markus' (1983) research presents practical strategies regarding the theories of resistance, which bridge industry and academia. The author recommends that explanations of resistance are vital because no matter how obvious or intrinsic the theories are; they ultimately guide the strategies and influence management and practitioners attached to ISD. She also argues there is a real need to understand the common beliefs and underlying assumptions made, because this will, or should, lead to more effective implementation strategies and management of organisational change. This study is more than two decades old and the industry has changed beyond recognition over the twenty year period, yet the same issues still reverberate among academics and practitioners. The inclusion within this section of work by Markus (1983) and Keen (1981) does not require further justification. Doolin’s (2004) recent research study has been included to formulate some comparable and/or dissimilar features of this phenomenon, and highlights how the new sophisticated user can influence organisational activities and manipulate technology by facilitating power and control within an organisational setting.

The following worldview assumptions about why resistance happens are the most common motives that are highlighted by academia, rather than a definitive list of reasons for resistance:

- If the technology does not work as expected
- If the system is not user friendly
- Users will naturally resist change (human conditioning)
- Users will resist if the costs outweigh the benefits
- If the users are not involved in the ISD process
- There is a lack of top management support
3.3.2 Statements that explain why user resistance happens in IS

Keen (1981) discusses long term change in organisations, reviewing the causes of resistance and what is described as *counterimplementation*, when he refers to a type of overt tactic to resist change. The author encapsulates the ‘why’ question with the fact that IS inevitably alters relationships, working patterns, and communication channels and, with that, perceived power, authority and, ultimately, control. The redistribution of information and the breakdown of established monopolies equates to the dissolution of power structures. Change becomes an intruder into the familiar working environment of the users who perceive the IS both as threatening and unnecessary and ultimately as a criticism of themselves (Keen 1981; Grover 1988; Markus and Pfeffer 1983). Although there exists work that focuses upon reasons for resistance, it predominantly refers to the resister’s pathological fear of change, and in the context to IS-related change, technology (Friedman and Cornford, 1989; Selwyn 2003; Hirscheim et al 1988). Katz and Kahn (1978) for example, have identified six areas of resistance to organisational change that they argue to be mostly people-centred and closely related to fear of job loss, reduction of power, and insecurity.

<table>
<thead>
<tr>
<th><strong>Over-determination</strong></th>
<th>The very nature of organisational structures, which are designed to regulate, recruit, reward and maintain their business in a rigid manner, becomes a barrier to change.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Narrow focus of change</strong></td>
<td>When viewing any change process a narrow view of the situation is often taken, viewing only the area of change rather than a holistic view of the impact of change throughout the organisation.</td>
</tr>
<tr>
<td><strong>Group inertia</strong></td>
<td>Group dynamics constrain change and become obstructive towards an individual, constraining behaviour rather than complementing the individual and reinforcing the position of change this goes back to the fear factor.</td>
</tr>
<tr>
<td><strong>Threatened Expertise</strong></td>
<td>Any change in role or job function will present resistance, as the skills required may not be acquired or expertise may become</td>
</tr>
</tbody>
</table>

62
Resource allocation is indicative of power and strengths within the organisation. Any indication that these resources may be withdrawn will activate resistance to change.

Any restructuring of the organisation may alter existing decision making processes.

Table 3.1: Sources of Resistance - (Katz and Kahn 1978)

3.3.3 Political games

Keen’s (1981) study has some aspects, which, have been superseded, but although this seminal work was published over two decades ago it still commands authority and has significance today. Part of this author’s work is concerned with the intricacies and importance of political mechanism in organisations, which is echoed by Markus (1983). Keen’s (1981) main argument is that ISD is both a political and technical process, and that there is a fine line between honest resistance to an ISD that the users feel inappropriate or misguided, and the resistance displayed by a user who selfishly sabotages a necessary technological change. Both instances are political, but what divides them is the user’s personal ethical code. Markus (1983) structures her argument by separating three basic theories, which are differentiated by their underlying assumptions about IS, organisations and resistance itself.

Markus’ three theories of resistance are:

- System-determined resistance – resistance occurs when the information systems are perceived to be inherently inadequate for the requirements. The systems are not ergonomically well designed and are not user friendly. Markus (1983) explains that substantial research supports this finding that resistance and system failure is linked to poor design and there are two decades of further evidence
supporting this fact (Davis 1989). Meanwhile, Markus and Pfeffer (1983) argue that resistance is not a simple issue of inadequate design features or erroneous personal features, but add that IS design must include political and social factors in order to minimise resistance.

- People-determined resistance – individuals or groups resisting because of internal factors. These internal factors may affect the group or the individual. The underlying assumptions upon which these are based are that people resist all change, and the human pathological fear of the ability of information systems to bring about change. Other assumptions are that individuals with cognitive styles of working may accept and that intuitive users may resist.

- Interaction theory of resistance – what differentiates this theory is the key word ‘interaction’. Assumptions are derived from instances where organisational information becomes centralised but the authority structure become decentralised, so distancing potential access to information and thus power. Those who would lose power may resist systems that alter the power relations and affect the cultural norms. Resistance therefore occurs as the technical design is contextualised (socio-technical) with the social environment of the system. This assumption is based upon the redistribution of responsibility, tasks, and communication/power channels throughout the organisation, in the wake of an ISD. The system may inadvertently structure working practices that conflict with the culture, and systems can then be perceived as the architect of change, and the technology is resisted.

Doolin (2004) reports that previous studies show that while the introduction of IS systems in organisations may be cloaked as an efficiency exercise or a strategic decision, the purpose will be influenced by social and political processes that already exist (Markus 1983). IS can redesign and restructure organisational activities and the consequences are visible but IS becomes a mechanism that can be manipulated. It can be argued that there have been previous studies that have highlighted IS facilitating power and control as far
back as Keen’s work (1981). Doolin’s (2004) recent study contributes to the ongoing debate that information is a central political resource; organisational actors obtain their influence and maintain autonomy because of access to the information. The empirical research stems from a case study, based in an Australian hospital, of an IS implementation intended to monitor the activity and performance of doctors. The doctors, however, were not passive actors but ‘skilled game players’, as Keen (1981) labelled certain user types that take advantage of implementation project that have ill-defined goals or ambiguous specification. The gamers manipulated and resisted the monitoring capabilities of a newly implemented IS by challenging the system validity against variables of cost, efficiency and efficacy, and, once highlighted, these weaknesses were repackaged and the system was used to justify and validate more medical resources. Once playing the ‘game’, Keen (1981) explains that there are predictable exploitation moves. In the Doolin (2004) research, the doctors observed that the indefinite system was ‘up for grabs’ and they took over. Grover et al (1988) suggest a certain naivety of some IS practitioners, adding that IS development and implementation is a highly political process where both the users and practitioners are more concerned with furthering self-interests than contributing to the organisational goals. Practitioners can be positioned as vulnerable in some relationships, and the authors suggest that they may be oblivious to ulterior motives that users may be guided by (Grover et al, 1988).

3.3.4 User resistance clarified by the IS community

The academic community includes conflicting opinions and perspectives concerning the appropriate response to resistant behaviour. Hirschheim and Newman (1988:398) offer a sympathetic response but this is often a lone voice within the IS community:

"Because change is often accompanied by uncertainty (real or perceived) there are good reasons for accepting resistance as the normal behaviour of individuals and groups"
In a more general context, resistance can be understood as the intentional acts of commission or omission that defy the wishes of others (Ashforth and Mael 1998). In an IS context, this might be exemplified as the negative behaviour of system users that may prevent system designers achieving their objectives and, ultimately, system implementation (Markus, 1983). Resistance in an IS context might involve a lack of participation in requirements gathering, implementation processes or, during operation, the refusal to use a system (Hirschheim and Newman 1988). More specifically, in an organisational context, we can view resistance as the activities through which those in organisations seek to oppose official and unofficial forms of control. (Gabriel et al 2000)

At a more micro level, Dickson and Simmons’ (1970) study, suggests three generic categories of behaviour that can be demonstrated by the user. Although it was undertaken more than three decades ago, this study is still a valid classification tool.

- The first category is aggression, a behaviour which denotes an attack, either physical or non-physical, of which the sole purpose is to injure or harm the object which presents the change.
- The second category is projection, a behaviour which projects the blame directly away from the user onto the systems which are causing the problem.
- The third category is avoidance, a behaviour which is less visible, as it involves the user protecting herself or himself through avoidance of the system or by withholding from the system.

The reason this categorisation possesses such strength over other groupings is that there are only three categories into which the many different forms of resistance behaviour can be divided. Dickson and Simmons’ (1970) influential work on how resistance manifests itself can be observed, however faintly, in many instances of later research on this subject.
The three theories offered by Markus (1983) to explain the occurrence of resistance, namely, system-determined resistance, people-determined resistance, and interaction theory of resistance, are explored in more detail in section 1.8.2. Markus’ (1983) influential work is based upon a set of assumptions that underlie her three categories/theories, and, as the author states, builds upon, and draws heavily from, Kling’s (1980) perspectives and insights regarding the examination of theories of resistance. The assumptions that will be included in this section in the pursuit of unravelling this complicated concept are assumptions that are made and continue to be made regarding the nature of resistance. Markus (1983) draws attention to the fact that apart from what causes resistance, there can be different assumptions made regarding the nature of resistance and the role it plays within the organisational environment. What the author highlights is the logical proposition that resistance is generally defined as behaviour intended to prevent the ISD procedure or to hinder the newly implemented technology. Resistance is frequently applied to instances of non-use when the very act of non-use could also indicate inadequate training or a reluctance to use the system due to fear. It is also true that although behaviour may be observed, intention cannot, which swings the viewfinder onto those monitoring behavioural and intentional activities. Individuals who are monitoring and ultimately labelling users as resisters imply that resistance is a relative comparative activity, rather than an absolute unconditional behaviour. Markus (1983) argues that an assumption is made that there are those who intend to introduce change and that there are those who intend to prevent change from happening. The danger of this assumption is that resistance can only be believed to be detrimental if the intentions of the IS designers, IS developers, and IS practitioners, are accepted as desirable. The concern with this is that resistance is considered a negative that must be avoided. Furthermore, this also highlights the notion that intentions of designers and or practitioners are rarely identified or analysed. Grover et al (1988:146) use powerful language to argue from this potentially blinkered perspective, which disregards users’ intentions and assumes the intentions of developers to be desirable, as they place system failure at the door of the users who have resisted the technology:
"The cause of failure of many technically well designed and potentially effective systems can be attributed to individuals and groups who actively attempt to prevent development and implementation. They do so by resorting to deliberate tactics of obstruction when a project threatens their parochial interests by invading their territory, reducing their autonomy or increasing their workload."

Marakas and Hornik (1996) note that any resistant behaviour toward IS that reveals itself is generally thought to be dysfunctional and motivated by crime or personal gain. Hirschheim and Newman (1988) include an observation of physical resistance, with users pouring honey over, and inserting paperclips into, new data entry machines. A significance that should be drawn from this statement is that the authors maintain user resistance in ISD and use has plagued the IS arena for decades prior to the publication of their work, which indicates that user resistance was ever present but that no solutions had yet been diagnosed (Hirschheim and Newman 1988). The publication date of that seminal paper was seventeen years ago. What the IS research community is attempting to address is an inherent condition that continues to plague the IS arena.

3.3.4.1 Behaviour, Intention: overt and dysfunctional

Resistance, to withstand or oppose, immediately invokes the image of confrontation, hostility, and conflict, a negative idiom often used by those initiating the change or those facilitating the change. This tactic strengthens and privileges management’s position so that the rationality in the organisation is justified to triumph over the interests of the users (Newman 1989). If there is a lack of commitment or willingness to change, this can be seen as a precursor to indifference and deliberate resistance to implementation. Jiang and Muhanna (2000) suggest that because system implementation is not an entirely rational process then it would be a logical assumption to further suggest that resistance is not an irrational response to change. In further examination of users’ responses, Hirschheim and Newman (1988) report on a variety of studies which explore behavioural attitudes that resistance to change evokes. The study that offers a range of potential behaviours is
appropriate only for the purpose of this study because the fieldwork includes a wide range of behaviours and reactions of users, due to a diverse group of individuals experiencing change. This user group is diverse because of the professional status, professional experience and emotional intimacies of its members. However, this diverse group is not unique but shares common features with potentially all user groups involved in ISD projects. Change can be experienced completely differently by comparable users, depending on the different variables that the users interact with; no two user’s experiences will be the same. The study by Jiang and Huhanna (2000) echoes this thought process. The theoretical framework they used to structure their argument is constructed from three components: people-orientated, system-orientated, and interaction theories (interestingly the authors cite Kling (1980) rather than Markus (1983) when they introduce the theoretical framework, which they used to structure their research, which is questionable since it is Markus’ construct they actually use). The interaction theory however is concerned with the interface between users and systems. What is interesting is that central to this theory is the perception that systems acquire different social and political meaning in different environments and that different users also react to the same system differently. It can be argued that a well-designed, correctly specified system is resisted because there may be a potential shift in power relations or of social status because of the system’s capabilities. The authors argue that the ‘real reasons’ for resistance are the perceived values and social content gain or loss of ‘users’ that occur before or after system implementation. This hybrid explanation of resistance suggests different outcomes for the same system in different settings, or different responses by the same group of users to different systems (Jiang and Muhanna 2000:26). Marakas and Hornik (1996) continue to argue that in many theoretical perspectives of IS there is an underlining assumption that user resistance is an observable behaviour, together with any associated behaviour. The authors also add that resistance is assumed by these theoretical perspectives to be dysfunctional, motivated by either criminal or personal intent. Newman (1989) also takes this line, positing assumptions that often view resistance as negative, with derogatory actions, and suggesting that these actions should be eradicated. Resistance, therefore, is often portrayed as covert, and unlawful, often involving gratuitous acts.
Resistance to technology as discussed above is not a new phenomenon; the Industrial Revolution in England engendered extraordinary change, which resulted in the destruction of Hargreave's Spinning Jenny\(^3\) (a machine designed to spin multiple bobbins of cotton in one of the first mechanical procedures for making cloth) at Blackburn, Lancashire in 1768, and the formation in 1811 of the Luddite Movement\(^4\), which became famous for its destruction of stocking weaving machines in Nottingham. These are examples of overt resistant behaviour as users/workers attempted to retain existing working practices, fearful of changes that technology was initiating. User resistance evokes a negative reaction and is often accompanied by an unconstructive stance that resisters may cause unlawful or unwarranted actions. The result is potential approaches from the organisation to deal with the resistance rather than to understand the source.

### 3.3.4.2 Behaviour and Intention: covert and passive

In an attempt to bring clarity to this subject matter, Marakas and Hornik (1996) offer a definition stemming from their study of passive resistance misuse within this subject area. They define passive resistance as:

\(^3\) In May 1768 James Hargreaves' first spinning jenny was dismantled in 1767; two years later more of his machines were destroyed. In 1776, the West Country experienced widespread popular sabotage of almost every form of machinery associated with the woollen industry. Three years later, a mob around Blackburn demolished every carding engine and all the jennies that used more than 24 spindles, as well as other machines utilizing water or horse power. (http://www.historycooperative.org/journals/llt/55/horn.html)

\(^4\) In 1811 the first threatening letters from General Ned Ludd and the Army of Redressers, were sent to employers in Nottingham. Workers upset by wage reductions and the use of unskilled workmen began to break into factories at night to destroy the new machines that the employers were using. In a three-week period over two hundred stocking frames were destroyed. In March, 1811, several attacks were taking place every night and the Nottingham authorities had to enroll four hundred special constables to protect the factories. Luddism gradually spread to Yorkshire, Lancashire, Leicestershire and Derbyshire. In Yorkshire, croppers, a small and highly skilled group of cloth finishers destroyed the new shearing frame that they feared would put them out of work. In 1812, Luddism continued to spread and factories in Huddersfield, Halifax, Wakefield and Leeds were attacked. (http://www.historycooperative.org/journals/llt/55/horn.html)
"covert behaviour that results from both fear and stress stemming from the intrusion of the technology into the previously stable world of the user."

(Marakas and Hornik 1996: 208)

The authors argue that the IS literature is lacking in theoretical foundations to explain user resistance in the context of IS implementation because the straightforward opinion is that better theories of resistance will lead to better strategies (Markus 1983). The authors includes three theoretical perceptions regarding resistance assumptions that are positioned and influential within the IS community (Marakas and Hornik 1996). The first perception is that resistance to change is an observable behaviour with an associated behaviour. This overt behaviour will be or can be observed by other organisational actors and may generally manifest itself as dysfunctional behaviour motivated by criminal intent or personal gain. The second perception they identify is that resistance to proposed changes could be an early indication that the system design is potentially flawed, that it may not be a workable solution. It is with this theoretical perspective that a blending occurs with the user participation element. It is argued that active participation reduces resistance and manages user attitudes and expectations in relation to the proposed system, and encourages positive participation (Barki and Huff 1994 and Lyytinen 1988). The authors also add here that resistance can also be viewed as an instrument in a political power battle, with users not willing to surrender existing responsibility or influence (Marakas and Hornik 1996). The final assumption they note is one that is frequently reported in the IS community, which again illustrates a blurring, misunderstanding or misrepresentation that is often made within this discipline: there is an assumption that acceptance and usage of a system can be an indicator of a successful implementation. In a very linear and simplistic contextual setting, if resistance happens then the system could be rejected, which would equate to project failure. Conversely, if users accept and use the system, then the system could be deemed successful. Acceptance and use are relative constructs within this phenomenon but they can vary incredibly depending upon context. Lauer and Rajagopalan (2003) argue against this simplistic assumption that resistance is the flipside of acceptance. They argue that the simple conceptualisation of the
user–resistance relationship would be inadequate to comprehensively understand user behaviour.

A commonality of the studies is the focus on passive resistance, especially the covert behaviour. Lauer and Rajagopalan (2003) suggest that passive forms of resistance are both hard to detect and problematic to cope with. Users may demonstrate a reluctant acceptance, with no outward displays of frustration or rejection of the system. The authors continue to build a profile of the passive resister as having resentfully accepted the system in the role it has been intended for. A further passive resister’s response may be the customisation of working practices and the user who works differently to how the system was designed attempting to ‘outsmart’ the system. Finally, there is the maverick resister of the new system, who may silently scheme and conspire in the downfall of the system and deliberately cause sabotage and eventual termination of the system. Returning to Marakas and Hornik’s (1996) similar study (both studies focus on acceptance as the flipside to resistance and to the multifarious nature of passive resistance) both studies include reference to the use of mandatory systems, and the authors draw attention to the logical assumption that resistance will be through covert techniques since overt resistance would result in sanctions. Lauer and Rajagopalan’s (2003) opinion of mandatory systems addresses the complexity of resistance more directly by adding that apparent system usage may mask passive resistance or resentful acceptance. Exposing passive resistance is difficult as acceptance based on user attitude or usage will possible fail as a result of users concealing their true objectives. They further argue that a user may exhibit acceptance and resistance concurrently, towards different facets of the system, depending on stance, knowledge, control, or politics, which suggests that resistance could subsist alongside acceptance.
3.4 Should user resistance be perceived positively or negatively?

The issue of whether user resistance is a positive construct or a negative one has had academics postulating and positioning their findings and verdicts fervently (Hirschheim and Newton 1988; Friedman and Cornford, 1989; Wilson, 1999; Grover et al, 1988). One either believes that resistance can be a positive act, contributing to the greater good of ISD or empowering those individuals involved in the change process, or else that resistance is an unprincipled or dysfunctional activity that should be prevented or eradicated if resistant deeds have began in earnest. To justify the inclusion of this section, when positive and negative behaviour and intention has been dealt with in depth in section 1.2.1 falls into the complexity of the very issue of unravelling this phenomenon. The following section explores the alternative stances that academics report, and the alternative stakeholder lenses that they use, to observe either a panoramic or a blinkered view.

3.4.1 The IS community that perceive user resistance as a positive activity

The concept discussed by Hirschheim and Newman (1988) and consequently by other academics, and mentioned previously in this chapter, is that resistance can be a positive and legitimate behavioural response to technological change. The authors suggest that resistance should be encouraged because in some instances all change is neither productive nor beneficial. Additionally, they argue that change should actually be an accepted normal reaction to proposed change because it evokes uncertainty, either real and/or perceived. Hirschheim and Newman (1988) suggest that resistant behaviour is a universal phenomenon. Davis et al (1992) warn that IS practitioners should not jump to a conclusion and suggest that resistance behaviour may be a rational response by a rational user to a dysfunctional situation. Hirschheim and Newman (1988) confers with this view, suggesting resistance need not be counterproductive and that some types of resistance could result in an undesirable system or design aspects of such a system not being implemented (Marakas et al 1996) Resistance does not necessarily mean that the whole system is targeted or that the users are totally against any change - it may just be the proposed system or minor aspects of the suggested one. Jiang et al (2004) contribute a
logical response to an illogical phenomenon when they report that the system implementation process is not entirely a rational one, adding that resistance to the system implementation is not entirely an irrational response or a misguided or selfish act towards the intended changes. However, they add that the ultimate goal is a successful system, so there is a need to handle resistance in whatever guise it appears. Should the issue of terminology again questioned when the word resistance suggests opposition to somebody or something or the refusal to accept or comply with something. The very word insinuates its origin as Newman (1989) suggests by those introducing the change, such a disparaging manner so that the resisters become the aggressors rather than the victims. Those experiencing change may have suggested that they are simply challenging the transformation that technology has introduced or may introduce.

3.4.2 The IS community that perceive user resistance as a negative activity

The unravelling process regarding resistance being perceived as a negative activity is constantly being addressed throughout this chapter. This section has been included for symmetric reasons to include some discussion regarding available research on this topic. Research is often predisposed, depending upon whose viewpoint the research is conducted from. Typically, resistance is seen as something that is deviant and irrational and it is the problem of the resisters (Friedman and Cornford, 1989; Wilson, 1999; Grover et al, 1988; Hirschheim and Newman's 1989). Hirschheim and Newman (1989) echo the assumption, which perpetuates because resistance conjures up the image of opposition or conflict, and subsequently there is an alleged need to neutralise and suppress observed activities. Lyytinen (1988) contributes to the debate by adding that much empirical investigation into IS failures, which include the full arsenal of users' activities and interactions with IS, have studied the phenomenon from a management viewpoint.

Newman (1989) focuses on five of the most popular forms of ISD fallacies. Though explored in depth previously in this chapter it is also worth a mention at this point. The author, in using this popular fallacies perspective from the IS practitioner viewpoint, is attempting to align the academic and commercial arenas and the contribution is to warn
organisations to be vigilant when embarking upon ISD implementation. The fallacies reported are: that resistance to ISD should be overcome; the integration of systems is a desirable and attainable goal; the analyst’s perception that ‘Our way is best’ at all times; and, finally, that organisational issues are not the concern of the systems developers/professionals.

Jiang et al (1998) also highlight the importance of taking into account other stakeholders’ perceptions in ISD projects. They argue that in the case of ‘failures associated with IS development, users and IS professionals do indeed have differing perceptions’ (Jiang et al 1998:936). Again, what is important is the caution offered by both authors to be aware of the importance that different perceptions of the stakeholders will make.

3.5 What are the strategies for dealing with user resistance in IS?

Unsurprisingly, there are many willing to offer advice as to how to overcome the so-called ‘problems’ of resistance. Some argue that there is a need for change to be adopted enthusiastically and a need ‘for generating favourable attitudes and behaviours towards new systems’ (Martinko, Henry et al. 1996; Oliver and Romm 2002). Others argue that without strategic user involvement at various stages throughout the ISD process, users will become threatened and resistance will follow (Marakas and Hornik 1996). The role of this section is to explore the different strategies that are suggested by the IS community to either prevent or, at least, minimise user resistance.

3.5.1 Strategies from the IS community for overcoming user resistance

According to Keen (1981:29) ‘a key step in the tactical approach to implementation is to convert the general impetus for change, which is usually based on broad goals and rallying cries, into operational objectives and a specific contact. Any project is vulnerable to counterimplementation (resistance) until that is done.’ With the aid of a military root metaphor the process is explained as tactical and premeditated (Winsor 1996). Like

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5 A difference to Newman’s (1989) findings is that (Jiang et al 1998) suggest that these different perceptions are only associated with issues that directly involve the IS users. This particular suggestion derives from the specific research boundary (narrow segment) the authors set to examine their results.
Keen's (1981) announcement, it is not the role of his research or this chapter to define a specific strategy or guidelines to pre-empt resistance. Firstly, it is suggested, the campaign should be spearheaded by a general (rather than aides-de-camp) who has the authority and resources to negotiate the allocation and distribution of information throughout the organisation. Secondly, there must be a steering committee that includes senior line managers so that all users have a voice. Political issues can be addressed and negotiated at a premature stage. Thirdly, it is important that the planning phase must be allocated enough time and resources, a point which Cavaye (1995) also emphasises, noting that the resource of time is often miscalculated and withdrawn as the project goes over budget or over time. Fourthly, a formal contract with distinct objectives and goals should be drawn up and signed, which requires the commitment of organisational actors and reduces the possibility of actors becoming gamers. The fifth guideline highlights the need for 'hybrid' skills to be applied. Keen (1981) predicts the crucial need for IS professionals to have a dual dexterity of technical and communication skills. Organisational and political issues cannot be dismissed; rather, listening to feedback and understanding these issues must have a high priority. The fact that underlies these five guidelines is that ISD is political as well as technical, and when this fact is understood and accepted, an accurate approach will be taken to ISD. That organisational politics is not always addressed continues to hinder ISD a quarter of a century later. The situation is made more difficult because organisational politics is hard to observe; as Keen (1981) notes, skilled resisters do not boast about their triumphs or successes, and fearful passive resisters are virtually impossible to observe and so interpret.

However, there are many different models, frameworks and strategies to evaluate user attitudes, on the premise that they are valuable tools for predicting user satisfaction and, hence, a lack of resistance (Al-Gahtani and King 1999; Brown, Massey et al. 2002; Kujala 2003; Venkatesh, Morris et al. 2003). Moreover, Barki and Huff (1985) claim, as part of their study of 32 decision support systems, that user attitudes are generally determinants of the success of any information system implementation. It was found that users' perceptions of IS success became strongly associated with the extent to which their
initial expectations were actually realised. They conclude that the clarification of the need for change, and an agreement of what changes are needed, are necessary for the diagnosis and solution of resistance to change. In contrast, Grover (1988) includes Ginzberg’s (1981) somewhat radical suggestions regarding a behavioural type that would prevent a successful system being implemented. Commitment is required from both management and the user, a commitment to the IS project. A second requirement would be commitment at an organisational wide level to the actual change process. A strong working relationship would be key to these suggestions, with users having previously agreed to the principle of the proposed changes. This suggestion does not tolerate any of the human-centred aspects that Katz and Kahn (1978) identify in their study of organisational change.

Jiang and Muhanna (2000) report a variety of strategies that researchers have identified to overcome resistance, which they classify into two categories: participative and directive. The directive strategies are usually imposed by management include: job elimination for those who do not want to learn to use the new system, financial incentives for use of system, user rights directives, role modifications, power redistribution, top management support, job status modification, and job counselling.

<table>
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<th>Suggested intervention strategies</th>
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<tr>
<td><strong>Strategy</strong></td>
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<tr>
<td>Pre-introduction</td>
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<tr>
<td>1. Cue differentiation</td>
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<td>2. Immunisation</td>
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</table>
3. Plan for success | Design an implementation plan which eliminates early failures and programs early IT successes.

4. Selection | Screen and the select employees with positive IT related attributions and expectancies.

5. Self-determination | Involve users in information system and work system design to encourage a sense of self determination and personal control.

Post-introduction

6. Attributional training | Through counselling provide users with alternative attribution frameworks

7. Modelling | Identify and publicly reward successful and credible 'model-users'.

8. Imagery | Through training produce successful images to cue facilitative user behaviours

9. System redesign | Redesign and restructure the information system to facilitate positive user attributions and expectancies.

| Table 3.2: Suggested intervention strategies (adapted from Martinko, Henry et al. 1996) |

Martinko, Henry et al. (1996) suggest that it is useful to conceptualise IS implementation intervention strategies at two phases throughout the project life-cycle, that is, at the pre-implementation and the post-implementation stages, because users' behaviour is likely to vary across these two implementation phases. The authors suggest several interventions (see Table 3.2) that may be effective in minimising user resistance. The table is self-explanatory and authors further suggest that this model may provide academia and
industry with a useful conceptual framework for developing a different perspective of users' reactions to the implementation of new IS. As such, its application should enable academics to better explain how resistance develops (or reduces) over time and should enable practitioners to better explain user reactions to implementation and intervention strategies (ibid). A further objective is to enable managers to develop implementation plans that are more likely to produce successful implementation outcomes. These are very much preventative measures for alleviating and reducing negative user reactions to IS, though what emerge to be simplistic strategies could arm and ultimately empower the user.

3.6 What is user participation and why is it needed?

The role of user participation and ISD are continuing to become blurred, as a result of the ongoing advancement of user-friendly software development tools and competitive pricing. This has presented an opportunity to users that are not technically trained to develop and customise software for their personalised business usage. This evolving role in End User Development (EDU) means that ISD is no longer restricted to IS professionals. In real terms, EDU may be considered to be the definitive illustration of user participation (Cavaye 1995) where IS specialists may not even play a major role.

3.6.1 Why is participation needed in IS?

There is evidence of conflicting opinions regarding why participation is needed and is beneficial, and although the literature expounds the importance of user participation, empirical research presents inconsistent results (Cavaye 1995). The research process is reported to be burdened by the limitations of widespread use of quantitative methods, incomplete and inconsistent use of variables, absence of the repeated use of the same research instrument, and a lack of attention to important contingencies like the type of systems, and development methods employed. This section explores IS commentary regarding the precarious participation-success relationship.
3.6.2 Statements that explain why user participation is needed in IS

While discussing the *participation-success* link, Cavaye (1995) suggests that empirical research has revealed that there are additional influences that impact this relationship that emerge in the guise of motivational factors and user cognition. The Baronas and Lucas (1988) study has been cited as evidence to support the influence of *perceived control*. Baronas and Lucas (1988) propose that any IS implementation poses a threat to the users' sense of control within their working environment, so by giving users a sense of control the level of acceptance will improve. The authors report that users' participation throughout the development process may have less impact than endeavours that aim to re-establish *perceived* user control. A further influential factor affecting the *participation-success* link is the assumption that users' involvement is at a desired level of participation rather than the users' actual level of participation. Cavaye (1995) states that this assumption is not necessarily accurate and that not being aware of this inaccuracy may also have a detrimental effect on the precarious *participation-success* relationship. The author cites Doll and Torkzadeh (1989) who tested this discrepancy theory and found that users who participate either less or more than they wish become dissatisfied with the finished system. Communication between users and IS developers is crucial for establishing a balanced platform.

A final influence is the perceived importance and relevance of the system to the user. Barki and Hartwick (1994) found that user appreciation is based upon the personal importance and relevance of the new system to the user. The *participation-success* link has demanded a continuous debate with a somewhat tenuous agreement that user participation enhances and advances the link but does not guarantee success (Cavaye 1995; Butler and Fitzgerald 1997; Franz and Robey 1986). The Butler and Fitzgerald (1997) exploratory paper complements previous studies on the debate raging in ISD about whether user participation equates to successful ISD implementation. They also suggest that many in the IS arena agree that user participation is necessary, but that this belief is not grounded in theory nor substantiated by research data. The authors believe the reason to be, indicates a lack of understanding ISD occurring in organisational. Ultimately, all research has to return to an organisational setting. The authors’ argument
focuses upon a qualitative in-depth description of the complex social nature of the phenomenon. Their findings indicate that a high degree of direct and indirect user participation does not guarantee successful implementation. But the participatory exercise however result capturing user requirements and satisfied user information needs which echo Howcroft and Wilson (2003) seminal paper that concentrates upon the paradoxes of participatory practices.

3.6.3 User participation clarified by the IS community

User participation is a complex activity that challenges clarification. However Cavaye (1995) manages this, explaining that participation is not a clean-cut concept, but a homogenous concept that can take many forms and can occur at many levels. She adds that to describe participation, as a collection of activities completed by the user does not present a realistic view of what really occurs because there are many ways users can become involved with a system. Cavaye (1995) has identified six groupings of participation characteristics within the literature; these are presented in Table 3.2. The role of this type of terminology dissection is to make actors/stakeholders involved in any development process aware that there is no linear route and that the process is multifaceted. An objective of this chapter is to avoid ambiguity of definitions and labels; this subject area is replete with such ambiguity, so illustration of these participation dimensions has a valid role.

<table>
<thead>
<tr>
<th>Participation Characteristics</th>
<th>Characteristic Variables</th>
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<tbody>
<tr>
<td>Type of Participation</td>
<td>How many users become involved with the development? All end users could be involved but realistically representatives of the users would be more involved.</td>
</tr>
<tr>
<td>Degree of Participation</td>
<td>Users may have different levels of responsibility and input throughout the process. Users may simply share intelligence or are given responsibility of the full</td>
</tr>
</tbody>
</table>
Content of Participation

Users may be involved in different aspects of the design process, design enhancement activities, and/or the social and human aspects and impact of the development.

Extent of Participation

This characteristic acknowledges the extent and limitations of users, who will be involved closely at the problem definition and requirements stage. Participation is not normally required for the coding and physical build of the system in the mid-stage. User participation is required in the testing and implementations stages.

Formality of Participation

The manner of participation can be both formal and informal but be equally valid. Formal participation may take the form of organised groups and teams in discussion and official meetings, informal participations may take the form of unofficial and causal conversions and relationships.

Influence of Participation

This can take two forms: that the users are willing and contribute suggestions but the input may be ignored for various reasons, or that the users' input may be considered valid and contribute directly to the final product or outcome of the whole process.

Table 3.3: Participation Characteristics (adapted from Cavaye 1995)

The great debate that influences essentially all user involvement, user participation, user resistance studies is to bring in the user or not to bring in the user throughout the developmental process in ISD. Ivari (2004) argues that it is widely accepted that users
should be involved when developing interacting systems, though she warns of the ambiguity of what constitutes user involvement. Her empirical qualitative fieldwork derives from a discourse analysis from three software development houses. Five distinct discourses on user involvement have been identified. Livari’s (2004) work will be examined in depth because it has been selected by a prestigious international conference, International Conference on Information Systems (ICIS) and because, published as recently as 2004, this study offers a contemporary and significant illustration of participatory research to date. Additionally, the relevance of the empirical work strengthens this Scandinavian longitudinal study (three years).

The discourse themes are:

- User-centredness as tradition
- User involvement as imago factor and selling argument
- User involvement as a waste of time and money
- User involvement as a controllable and measurable quality improvement effort
- User involvement achievable through persuading, marketing and manipulating

The analytical review of what form user involvement is resulted in two distinct themes, which emerged from the assumptions of those involved in the study. These assumptions included: that there is a need to understand users and their tasks for basic design; that the design process involves redesign of users’ work and associated tasks; and that direct contact with the users is necessary to achieve and design useful, useable systems. Two distinct why and how themes emerged from Livari’s (2004) analysis of the previously mentioned assumptions which relate to why the users should be involved and, secondly, the related guidelines for how to involve the users. This section of the research sits in isolation from the main thrust of the paper, which is the five discourse themes that
emerged; the *why* and *how* themes have no role within the final discussion and are not called upon to justify or explicate other sections of the research. The author has cited Newman’s work, which is co-authored with Hirschheim (1988) but does not include Newman’s ‘Some Fallacies in Information Systems Development’ (1989) which has been previously included within this chapter. There are strong comparisons between the two authors’ work, as Newman discusses five popular ISD fallacies or beliefs. Newman (1989) focuses and discusses five of the more popular forms of ISD fallacies, namely:

- User involvement is beneficial
- Resistance to ISD should be overcome
- The integration of systems is a desirable and attainable goal
- The analyst’s perception that ‘our way is best’ at all times
- Organisational issues are not the concern of the systems developers/professionals

Newman’s *popular fallacies* perspective was established through empirical research gained from four organisations, by conducting a critical incident analysis illustrated by IS practitioners, users and senior management that were involved with the ISD process. By contrast, Livari (2004) used discourse analysis strictly gathered from software organisations. Livari’s (2004) first discourse theme of *user-centredness as tradition*, signified that all organisations included in her research study wanted to emphasise that ‘taking the user into account is acknowledged as important’ (Livari 2004:637). Newman’s (1989) first fallacy, of ‘User involvement is beneficial’ is similar; he notes, ‘it is now almost universally advocated by designers and users alike that users should be involved or better participate at various stages of the design process’ (Newman 1989:128). Among other parallels is the fact that both authors include the perception that user involvement involves unnecessary ‘costs’, but the difference here is that Livari (2004) focuses on inefficiency, negatively highlighting that user involvement is a waste of time and money.
and questioning the cost-benefit trade-offs. This revealed theme is particular interesting as the common assumption proffered within associated literature is that user involvement should be attained at all costs. Newman (1989:129) highlights the unconstructive consequence or ‘significant costs’ of user involvement that result in conflict, which is sometimes generated when forcing hostile users to cooperate in the design process. Both authors highlight intangible costs of user involvement to ISD projects, with livari placing emphasis on a tangible financial cost, highlighted because of the context of empirical fieldwork. The final comparison of the two studies highlights a certain limitation of livari’s study or a possible consequence of only involving one perspective, the software organisation, rather than including actual users. The majority of the discourses have an underlying marketing theme and the perspective certainly has a rose-tinted hue. This can possibly be seen through the last discourse, ‘User involvement achievable through persuading, marketing and manipulating’, that user involvement should be ‘sold’ rather than ‘sneaking in, in secret’. Once user involvement has been ‘sold’ then ‘the ones introducing user involvement should seduce and manipulate other people to buy into usability’ (livari 2004:639). There is no mention in the article of user resistance or dealing with any impact that ISD may trigger. Newman (1989) however, deals realistically with this subject matter and suggests that resistance is often portrayed as an activity that must be eradicated or as an activity associated with illegal and damaging behaviour. This conviction enables and privileges management to position the organisational needs above the needs of the user, ‘A senior systems analysis...found the only way of dealing with resistant managers was to get rid of them’ being ‘quite comfortable to ‘clear the path’ which is a euphemism for moving or replacing staff” (Newman 1989:130). There is not much evidence of seduction or persuasion in this incident but it does provide a sample of realism when dealing with a whole spectrum of stakeholders with individual agendas.

3.7 What are the strategies for encouraging user participation in IS?

There is a consensus that the user participation practice throughout the ISD process contributes positively to users’ expectations and attitudinal behaviour (Barki 1989; Gefen
and Ridings 2003; Barki and Hartwick 1994; Ives and Olsen 1984; Saleem 1994). Saleem (1994) further notes that there has been much debate regarding user participation and the importance of this concept and its role in system success. However, there is a lack of consensus about how participation equates to system success, which is a continuing dilemma for everyone involved in the process. The following section explores strategies that have been devised to encourage user participation and, ultimately, system success.

3.7.1 Strategies from the IS community for encouraging user participation

Cavaye's (1995) findings from the participation literature revealed mixed results. In an attempt by the author to evaluate those findings an assumption was made that some researchers adopted a contingency approach. The literature revealed to Cavaye (1995) a number of contingencies, which she arranged into three categories: the organisation, the user, and the project environment. These categories pointed to strategies about how to accommodate participation and facilitate participation, ensuring positive outcomes. Iivari (2204:632) also supports this view that environmental variables are problematic phenomena to manage and that 'the facilitation of user involvement has proven difficult.' She also adds that there is a general lack of knowledge regarding user involvement, users and the context of use. These unresolved issues are still being highlighted in published articles less than a year old; possibly it is the unresolved dilemma that should be the research focus? However, Cavaye's (1995) findings offer an appropriateness to this chapter section as they encompass a broad spectrum of observed participation activities that have been researched and published by the IS community. The organisational characteristics that have been highlighted as factors that should be considered stem predominantly from championing and support by senior management of the system development process, so adequate resources can be assured and/or released. User participation increases the demand on financial resources as more staff members are assigned to the project. Lack of resources would place restrictions and limitations upon the system development; the support of senior management alleviates these pressures. Another vital resource is time, as the involvement of users in analysis, design and implementation is time intensive. If a time restriction becomes a factor then the level of
user participation may be reduced. User related strategies to accommodate and facilitate participation are based upon the users' motivation to participate, together with their aptitude with the technology and attitude towards the IS project team. The compliance to participate is not a given, although the expectation of the IS project team is that users want to contribute so that their needs and requirements may be met. Compliance is increased if the system is perceived to be important to users, and non-compliance by the users, if they have been given the opportunity to participate, is equally a visible indicator of resistance (Cavaye 1995). Cavaye also highlights users' capacities to participate in a significant manner. There has to be a certain degree of understanding of the technology, the tasks expected and the environmental context. The IS project team requires a minimum extent of knowledge from the users so a valid contribution may be made, but it is at this stage that communications between the two stakeholders becomes essential, and effective management enables a meaningful participation process. The latter group of contingencies that have been highlighted as important to facilitate an appropriate environment to enable participation focuses on project related issues. The involvement of users in the developmental process ensures that needs and requirements, user involvement is more intensive the more complex the project. The availability of user-friendly software in the design process limits the need for highly skilled professionals and enhances users' participation, in some cases leading to independent user design. Customisation of 'off-the shelf' packages (Howcroft and Light 2006) illustrates how this participatory contingency factor succeeds. The final factor that has been highlighted by Cavaye (1995) is the basic factor that user participation will contribute support for the new system and alleviate unexpected and unpredictable changes, encouraging user commitment. Kujala (2003) also adds his voice to this theory that effective user participation results in improved user understanding of the system and, thus, increased levels of acceptability. This researcher's study aims to clarify user involvement and ensure usability in user-centred design. They conclude that the following benefits occur if effective user participation is conducted:

- Improved quality of the systems due to the users' requirement capture
- Designing a system that users do not want or cannot use – poor IS investment
Improving levels of acceptance

Greater understanding of the system will generate more effective use

Increased decision making within the company

Kujala et al (2003) combined qualitative and quantitative research work to establish their research goals. Qualitative research helped them focus upon the benefits, if any, of user involvement, and the quantitative research aided the study of the effects of user involvement on system success evaluation. They summarise their findings as being that users' involvement is clearly effective and increases user satisfaction, and that developers gain a more accurate picture of user requirements, directly from users. What is interesting is the avoidance of definition of user participation and user involvement, which are used interchangeably in the article. There is also a distinct lack of the word 'resistance' throughout the paper, in spite of the paper's ultimate goal being to prevent the power of reluctant users.

The participative strategies presented by Jiang et al (2004) are at the opposite end of the spectrum, and include training in the new system, allowing time to experiment with the new system in a safe environment, encouragement of open communication between employers and employees, establishment of user support networks, the building of user participation into the design process, and, finally, the documentation of standards and user guidelines for the new system, despite and irrespective of the different types of IS. The study by Jiang et al (2004) concentrates on a preferred strategy to engage users and promote a successful implementation through the use of participatory directives, which were highlighted earlier. The authors argue that there is a need to remember that research indicates that there is a strong relationship between user involvement and extremity of attitude. As discussed, IS evidence indicates that highly involved users are likely to develop very positive or very negative attitudes towards a system.

Amoako-Gyampah (2004) also adds his voice to this argument. The research he conducted looked at the influence that perceived usefulness, user involvement (this
author also has not defined user involvement or user participation using the terms interchangeable) and prior usage and ease of use had on the *behavioural intention* of users. He also found that efforts to heighten user awareness, increase users’ perception of usefulness, and create personal relevance to the technology, would contribute to a successful system, where success is defined as effective usage of the technology.

A decade earlier, Barki and Hartwick (1994) who reiterate their claim that user involvement and user participation are two separate constructs and should be dealt with as such, define user participation as activities performed in the ISD, and user involvement as how important and relevant the system is personally to the user (user psychological state with respect to the system). They also definition user attitude as an emotive evaluation that users formulate (Barki 1989; Saleem 1994). User participation is, once again, stated as an activity, which, if managed correctly, can be considered to be a key variable in successful IS development. However, they warn that previous research has failed to provide evidence to demonstrate that benefit.

Howcroft and Wilson (2003) discuss a number of paradoxes that, although relating to user participation, can be argued to sit hand in hand with user resistance. For instance, they discuss the potential compromises with which a system designer is faced, between management of user expectations of improved working environments, and an obligation to the manager to meet their managerial needs. They argue that power distribution within organisations ultimately means that managerial concerns have priority, as failure to address management’s objectives could mean project closure, even though ignoring users’ participation role could ‘compromise the goal of overcoming resistance’. However, in a refreshingly contrasting perspective the authors set out to explore the paradoxes of participatory practices. Their research on user participation highlights a factor that will threaten the validity of other studies: ‘that even with user participation, resistance still occurs’. The accepted assumption is that including users in the design and implementation of systems equates to success, and a lack of users’ input would correlate to failure. However, their research findings have shown that results are less straightforward; they have found unsuccessful systems that had user participation and successful systems where there was no user input (Howcroft and Wilson 2003).
3.8 Limitations of existing research

An objective of this chapter has been to conduct an unravelling exercise of the available published literature that sits under the user resistance and user participation banner. This objective was achieved but with the acknowledgement that research conducted around this phenomenon is of an infinite capacity. The sample selection process of actual included research was initially a random one that evolved organically into a structure whereby seminal papers and outstanding research studies surfaced through pertinence and relevance. In conducting this exercise, the limitations and disparity of available research on both user resistance and user participation was also revealed. This was an obvious consequence of the unravelling process.

An evident limitation that has been explored in depth and throughout the chapter has been the ambiguity and misuse of the terms ‘user participation’ and ‘user involvement’. There exists a valid argument for a universal definition of the terminology in use, which the IS community must lead and roll out to industry. There is relevant research available that has been in the academic domain for decades; concurring researchers constantly cite this research but there is little evidence of this clarification effort making any ripples of effect within the discipline (Ives and Olson 1980; Barki 1989; Franz and Robey 1986). Barki (1989) argues that in the context of IS, user involvement (in IS, user involvement generally refers to a series of interactivities performed by potential users or their representatives in the ISD procedure) is very different to the construct currently used in other disciplines (involvement generally refers to a subjective psychological state reflecting the importance and/or personal relevance of an issue, product, or working activity). Their argument stems from other disciplines’ positions, particularly Organisational Behaviour, which has previously debated this complex situation regarding user involvement and has reached this position via extensive consideration and rigorous empirical evidence. The authors argue vigorously that IS must take advantage of their experience and align the work in IS with these other disciplines (Barki 1989).

A further limitation that was also revealed through the unravelling process were the voices of academics, both warning and criticising that existing empirical and theoretical
research has not been relevant or rigorous enough, and has been insufficient. Few theoretical foundations currently exist in the literature for explaining user resistance in IS (Marakas and Hornik 1996). Better theories of resistance will lead to improved (Markus 1993). Existing research does not provide practical solutions or established theories for effective user participation (Saleem 1994), and past research has failed to demonstrate user participation’s role in successful IS developments (Barki and Hartwick 1994). Indeed, few empirical studies have clearly demonstrated that user involvement directly affects user satisfaction (Barki and Huff 1985), and there have been observable weaknesses in a large number of studies, due to poor articulation of the concepts. Furthermore, many of the studies have failed to take into consideration the richness of the phenomenon (Lyytinen 1988), with empirical research on user involvement paying limited attention to the diversity of, and tension between, the users affected by the ISD (Butler and Fitzgerald 1997). Jiang et al (1999) suggest that the problems are widespread and pervasive and that no single feature can describe the phenomenon entirely, but surely this is the role of the IS community.

A further shortcoming, which has been observed during the review process, is a frailty of research methodologies, which has been highlighted by Cavaye (1995) in particular. The concern raised focuses upon the use of diverse research instruments, which Cavaye (1995) reveals, from an extensive review of the literature, to be wide-ranging, with minimal comparable examples emerging from the published literature, preventing cumulative research. Examples of this diversity include Davis’ (1989) Technology Acceptance Model (TAM) which has raised some issues in its application in mandatory systems; the Perceived IT group Responsiveness scale adapted by Gefen (2003) as a validation tool during an ISD, and the development of a Co-operative Methodology in IS development research tool by Guevara-Plaza et al (1994). Other constraints within the current research include the widespread use of quantitative methods. Quantitative methods have largely been relied upon but this has often been criticised for not drawing either a contextual understanding of a participation relationship between the user and any interactivities with the technology. Quantitative methods have enabled the capture of a ‘richer picture’ of the participation process and the environmental settings (Cavaye 1995), but incomplete and inconsistent use of variables, a validated measurement
techniques, the absence of the repeated use of the same research instrument, lack of attention to important contingencies like the type of systems, and development methods employed, as well as the continued issue that system success is often measured in economic terms by returns on investment. Economic justification and evaluation is problematic as intangible benefits and costs are initially hard to identify and are impossible to express financially. The IS community relies upon other assessments such as user participation (not in every situation) that can be a main indicator of a successful system, especially when system use is mandatory. There is an extensive array of limitations reported and personally observed as a result of the unravelling process. In funnelling down specific research decisions, the case study empirical data of this thesis has been used in the selection of which limitations necessitate further exploration. Limitations of further focus will include, firstly, the failure, and impact of that failure, to stipulate and/or disregard the term of system use, when contributing to the debate of user resistance. The terms of system use can be defined, for this research purpose, as how the systems will be deployed either in a mandatory or voluntary mode. In general terms, the IS community has had a propensity to overlook the different nuances of resistance in practical terms; there are academics that have designed and focused their research around system type or terms of system use, but they are in the minority (Jiang and Muhanna 2000). A second limitation observed in current research indicates a further common error of applying 'one-size fits all' strategies when addressing the user resistance phenomenon. Users are generally regarded within the literature homogeneously, rather than heterogeneously. The consequences of addressing users as a throng, and so constructing irrelevant and inadequate solutions and strategies, should also be areas of further scrutiny.

The following dialogue is a reflection, rather than a limitation, that has been heightened by the previous chapter's focus on the covert use of metaphorical language. There is a common practice of using medical root metaphors to aid understanding and explanation of this phenomenon by IS academics. Hirschheim and Newman (1988) talk of IS being plagued by the problem of not addressing user resistance and, in an echo of the limitation of 'one-size fits all' strategies highlighted above, the authors use the metaphor of blanket prescriptions as a warning away from single solutions to a multifarious situation. Other examples of medical metaphors are the careful diagnosis, diagnosing, analysing
symptoms, prescription, remedying, and prognosis. Davis et al (1992) include a rash of metaphors that are endorsed further where problems/issues are symptoms (Newman 1989) and problem identification becomes diagnosis (Barki and Huff 1985). Are IS researchers confused, ambivalent in their responsibility of the consultancy role, seeing themselves as doctors attempting to heal and nurse back to health a failed system or a user resistance affliction? The problem with this concept is: can a diagnosis of the infection or sickness be decided upon, then can treatment be prescribed and, finally, can the patient (IS problem) be healed? This is merely an observation of what some literature is revealing but is it an indicator that the endemic problem is now of epidemic proportions.

3.8.1 Lack of awareness of the Terms of Systems Use

As previously mentioned, the empirical case data that has been collected in association with this thesis is based upon mandatory system use across miscellaneous terms of system use. These factors drove the literature search and present natural boundaries around the essence of research. From the outset, the factors that were acting as a guide began to create barriers, and an acknowledgment the term of system use was not deemed important dynamics or variables, in many cases, when constructing a research rationale. However, there are many valid published research scenarios that do not require the identification of the term of system use. What is being argued and referred to in this instance is research focusing upon a user’s behavioural intention, and interaction with technologically introduced change. Users will react very differently when using a mandated system in comparison to voluntary systems or a hedonic system. Mandated systems also imply but do not deduce the status of the user, whereas voluntary systems suggest that choices in working practices are optional, signifying a decision making status. Marakas et al (1996:211) offer this concept when highlighting different behavioural patterns resulting from users reactions to different modes of systems use:

“Non-use of a mandatory system normally results in sanctions and therefore requires an act of heroism.”
In contrast, Van der Heijden (2004:696) suggests that hedonic systems, such as the World Wide Web, are aimed at provide self-fulfilling value to the user:

"The value of a hedonic system is a function of the degree to which the user experiences fun when using the system. To have a pleasurable experience individuals often seek sensations on multiple sensory levels."

If rigorous research is to be realised, then definitive system use should, at least, be noted when discussing user behaviour patterns. The process of synthesising previous studies in order to understand the behavioural patterns of users when interacting with different terms of system use proved more difficult than it should; Table 3.4 demonstrates the limited list of authors who named the required system usage and user behaviour within their studies.

<table>
<thead>
<tr>
<th>Authors</th>
<th>Reported terms of use</th>
<th>Reported outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barki and Huff (1985)</td>
<td>Mandatory and voluntary</td>
<td>User satisfaction</td>
</tr>
<tr>
<td>Author</td>
<td>System Mode</td>
<td>User Behaviour</td>
</tr>
<tr>
<td>---------------------</td>
<td>----------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>Olson and Ives (1981)</td>
<td>Mandatory</td>
<td>User involvement</td>
</tr>
<tr>
<td>Van der Heijden (2004)</td>
<td>Voluntary</td>
<td>User acceptance</td>
</tr>
<tr>
<td>Townsend (2005)</td>
<td>Mandatory</td>
<td>User resistance</td>
</tr>
<tr>
<td>Marakus (1983)</td>
<td>Mandatory and voluntary</td>
<td>User resistance</td>
</tr>
</tbody>
</table>

Table 3.4: Literature associating user behavioural patterns to different terms of system use

This is obviously not an exhaustive study of every author who has actually identified the system mode upon which their research is based was, voluntary or mandatory. Nonetheless this short list reveals the scarcity of authors that do go as far as to include these details. This is an area within IS academia which appears to be totally misaligned with the IS commercial sector who necessitate and invest in distinct system needs, mandatory or voluntary.

Brown et al (2002) note that there has been extensive research devoted to user intentions in adopting new technology but that this research has primarily focused on cases where adoption has been on a voluntary basis. They focus their research on mandatory systems, which, implausibly, may form the predominance of IS, based upon an *ill-equipped* assumption that, for example, decision support systems (DSS), management information systems (MIS), enterprise resource planning (ERP), group support systems (GSS), customer relationship management (CRM), executive enterprise systems (EES) transaction process systems (TPS) require an underpinning of obligatory, accurate and precise data. There appear to be no statistics gathered on the demarcation of whether the systems were mandatory or voluntary, which would be very useful information, although an impossibly moving indicator. Brown et al (2002) are concerned with mandatory system types and their definition, below, is two-fold; it gives basic understanding of a mandatory/utilitarian system, and the inference of working practices for users of different modes of systems.
A mandatory use environment is defined here as one in which users are required to use a specific technology or system in order to keep and perform their jobs ... Since employees must use the system to perform their job functions there are no alternatives to actual use.”

(Brown et al. 2002: 283)

Barki and Huff (1985) examine the relationship between change initiated by a decision support system (DDS), which alters users’ working environments, and the user attitudes towards that change. The authors argue that the users in their research are more satisfied and interact more with the systems that brought change, in comparison to systems that did not introduce substantial change. This raises a number of issues, including the issue of measuring success and the assumption throughout that resistance must be overcome. Variables of success that are frequently used as measurement mechanisms include the extent to which the users use the system, and user satisfaction. The reason why this research has been included as valid for this thesis is the acknowledgement in the study that success depends upon the type of system, especially if the system is mandatory. The study is twenty years old and there is an awareness then of the significance of the type of system usage. The authors add a rational prognosis, that system use could be a valid measuring tool for a system where the use is voluntary but that this would not be appropriate for mandatory systems, where the measure of user satisfaction would be a more appropriate measuring tool (Barki and Huff 1985). The authors also highlight the role of users’ expectations being a key construct in managing resistance/satisfaction, and their findings reveal that the extent to which users’ expectation were realised was strongly associated with a successful implementation. Barki and Huff (1985) did not reason the rationale to stipulate the term of system usage two decades ago but their work highlighted fundamental flaws when selecting variables in measuring and evaluating system success.

Lauer and Rajagopalan (2003) address a gamut of issues relating to stakeholder response to system implementation, and suggest it would be interesting to look at it for different units of analysis in the context of mandatory usage. Resistance to mandatory systems,
however, may still induce a behavioural reaction against technology; it would be both inaccurate and naive to suggest that compulsory system use never resulted in resistance of any form. At the micro level, individuals could accept the system fully (through usage and cognitively), partially accept it (limited usage), or overtly accept it (apparent usage, passively resist). Similarly, at the individual level, stakeholders could manifest resistance through a variety of actions, either actively or passively, or both. At the mid level, as with individuals, groups could accept or resist a system at different levels. The group may be homogeneous or heterogeneous with respect to acceptance and resistance. At the macro level, acceptance by the organisation could also occur at various levels, as could resistance. For example, within a supply chain, a dominant supplier may force a system on its suppliers. In turn, the suppliers may accept or engage in resistance tactics.

3.8.2 Homogeneous and heterogeneous strategies

Jiang and Muhanna (2000) explore user resistance through the lens of system types and argue that there is a lack of research into whether the reasons for resistance within organisations differs across system type, and into whether strategies to manage acceptance are effective across system types. They explain that the different types of system are normally associated with specific functions and user skills would then suggest that reasons for resistance differ across system types. An objective of this demarcation of resistance by system type is a practical one and may enable IS managers to apply a bespoke strategy to each system/resistance grouping. The view through both system type lenses is argued validly. This debate highlights the case for future research, with a possible merger of these research situations to form a tailored strategy.

Extant research does not clearly explicate the relationship between resistance and participation. What, then, does the research literature on system resistance have to say about participation? Owing to the fragmented nature of resistance research, this is not clear. It is expected that it shall be found that the literature often understates the complexity of user response to implementation. This earlier research still stands today, although the industry has evolved beyond recognition and users are far more sophisticated than the users of yesteryear. Users studied then were under scrutiny in
instances of paper-based processes being automated. However, change that alters the status quo, threatens jobs, power structures, redistributes information flows and stores is personal, yesterday, today and tomorrow.

3.9 Conclusion

The objective of this research study is to explore the use of metaphors to coerce users into compliance with management aims and avert user resistance in an IS project. The miasma of user resistance and user participation literature required unravelling. The selected literature was guided by the diverse user situation observed in the research study. Outcomes from the unravelling process are the ambiguity and misuse of the terms ‘user participation’ and ‘user involvement’. There exists a valid argument for a universal definition of the terminology in use. Few theoretical foundations currently exist in the literature for explaining user resistance in IS and existing research does not established theories for effective user participants. A limitation of the IS community has also been a failure to stipulate and/or disregard the term of system use, mandatory of voluntary, when contributing to the debate of user resistance. A second limitation observed in current research indicates a further common error of applying ‘one-size fits all’ strategies when addressing the user resistance phenomenon. Users are generally regarded within the literature homogeneously, rather than heterogeneously. The following chapter introduces the research process selected for the field study and the theory development in this thesis.
4 Research Methodology

4.1 Introduction

This chapter is primarily focused upon reporting the research methodology adopted for the overall study. The research concern that has driven this thesis, the role of metaphor used as a management tool in influencing behaviour to avert user resistance, has been set out in Chapter 1. Chapter 2 looks first at how the multifaceted metaphor is employed and exploited by academia. Chapter 3 focuses more on the metaphor literature, specifically through a theoretical framework; there is more of an emphasis how metaphors are used in an organisational setting. Chapter 4 shifts the focus onto the user resistance literature with the aim to establish how the IS community situates this phenomenon. Subsequently the positioning of this thesis' research in the overall body of resistance IS literature has been established. Drawing on these previous chapters, this chapter firstly looks at the research traditions in IS. The next section then presents an ontological foundation for this study and from that the epistemology approach adopted is considered. The research strategy that is consistent with such ontology and epistemology, qualitative research, is then explored in relation to the research issues of this thesis. Following this, the data generation method adopted is then dealt with. In closing this chapter, an evaluation of the research methodology is discussed.

4.2 Research Tradition in Information Systems

The research process reported upon for this thesis facilitated a three-year investigation into an organisation undergoing extreme change. There was a major distilling exercise in selecting and disregarding pertinent empirical data to support the research concern under study, and discrete areas of the disregarded empirical data have been used in other research papers. This distilling exercise was very much guided by foundational theories

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Information Systems (IS) is a discipline that focuses upon the development, use and impact of Information Technology in a business and organisational setting. This is increasingly being extended to include behavioural and organisational considerations.
and concepts from the IS research traditions discipline. Prior to deliberation on what is meant by IS research traditions for this thesis, an inclusion on the status of the IS discipline was considered a valuable exercise (even though a somewhat limited one).

Adams and Fitzgerald (2000) warn that the IS field is fraught with identity issues, not yet branding itself effectively in academia or industry, emanating from the fact that it is relatively immature in comparison to other established disciplines, for instance, sociology. ‘This area of study is quite new - it only emerged in the 1960s’ (Myers and Avison 2002:3). The authors further warn that the field is characterised by a lack of commonly acknowledged conceptual underpinnings, although they concede ‘there are islands of cohesive thought, but no overarching conceptual roof’ (2000). Garcia and Quek (1997) also argue IS researchers have had little option other than to borrow theoretical approaches and assumptions from more established disciplines because of the relative immaturity of the IS field. They further suggest that the resulting impact could be the lack of consideration of potential excess baggage that may be associated with borrowed underlying assumptions from alternative disciplines. This may then lead to disproportionate levels of research activity with a concentration on the methodological, practical issues, rather than the philosophical reasoning behind research approaches. Nevertheless, this lack of universal IS research approaches presents confusion about what IS theory sufficiently informs effective processes of enquiry, posing complexities for IS researchers. How should this research problem (the use of metaphors to influence user behaviour when undergoing extreme IS change) be approached? While the review of IS literature has revealed little previous research had been conducted within this particular domain, it has not been an objective of this study simply to generate empirical data without theoretical underpinnings; rather, the focus has been on producing rigorous and relevant IS research.

When discussing IS research traditions there are now acknowledged ‘classic’ seminal publications that require some degree of reference (Myers and Avison 2002). One such paper is the Orlikowski and Baroudi (1991b) study, regarding 155 IS research articles published from 1983 through to 1988. The authors’ aim of this study was to generate some reflection regarding the implications of selected research approaches that are
employed in the study of IS. It is argued that there is a limited range of research traditions and the survey supports evidence to this argument. This historical analysis of research paradigms has recently been updated. Chen and Hirschheim (2003) considered the paradigmatic and methodological progress that has been made since the Orlikowski and Baroudi findings in 1991. The authors take into account the changes in political and social context and the variations in publications’ preferences and distribution methods and audiences. They examined 1893 articles published in eight major IS publication outlets between 1991 and 2001. The study revealed that IS research is not entrenched in a single theoretical perspective. However, the study does demonstrate a prevalence to a single set of philosophical assumptions ‘regarding the underlying nature of the phenomena being investigated’ (1991:1). When reviewing the articles by their epistemologies, positivism was by far the more dominant; 96.8% of articles between 1983 and 1988 indicated a positivist epistemology. In the more recent analysis, positivist research continues to dominate the field with 81% published empirical research papers but there has been a change of 30% in quantitative based research. The 1991 analysis revealed that there were only 3.2% articles with interpretive epistemologies and there were no studies with a critical epistemology. In comparison, the 2003 analysis fails to make the distinction regarding interpretive and critical epistemologies so the assumption is made that 19% of the published papers are of an interpretive persuasion. Richardson and Robinson (forthcoming) offer a rejoinder as they address the “mysterious case of the missing paradigm – that of the critical perspective” from Chen and Hirschheim’s 2003 analysis. The authors argue that to include only the interpretivist and positivist paradigms presents a somewhat partial view of researching and understanding the world. Researchers are almost coerced into making a choice from limiting methodological choices between positivism and interpretivism. Richardson and Robinson (forthcoming) suggest that recent trends in critical IS research have yet to be evaluated but there has been increasing activity over the past six years.

The overall findings suggest that the situation continues to shift, though not significantly, indicating that the positivist paradigm continues to overwhelmingly dominate the IS research community. Nevertheless, an indication of this shift is when Klein and Myers (1999:87) in another determining paper, suggest that ‘Interpretive research has emerged
as a valid and important approach to information systems research. Most mainstream IS journals now welcome interpretive research and significant groups of authors are working within the interpretive tradition'. This interpretive orientation has posed further questions regarding how its relevance and quality can be evaluated effectively. In response Myers and Klein (1999) devised a now universally accepted set of principles by which interpretive field research can be evaluated. Walsam (1995) and others contribute to the debate in highlighting the growing awareness of societal influence on IS, or, in other words, the ongoing relations between individuals, IT (Information Technology) and organisations, inducing a degree of empirical research activity centring on human interpretations and meanings (Orlikowski and Baroudi 1991b). For this approach, in-depth case studies are suggested as the mode of investigation but ethnographical studies are equally valid. The continuing controversy of the development of the IS 'interpretive' empirical school has merited a great deal of attention (Walsham 1995; Orlikowski and Baroudi 1991b). There is still the ongoing paradigm debate within the IS community - quantitative or qualitative, positivism or interpretivism, or objective versus subjective - and in recent periods a critical perspective is equally becoming an acknowledged paradigm. The following section centres more closely upon this debate.

4.3 Research Strategy

This thesis is anchored to how organisational actors reacted to and resisted the change induced by new technology. A further component is the understanding of how senior management attempted to control and influences the workforce's behaviour through the use of metaphors. This study had the potential to move towards a diverse number of alternative research concerns that, equally, would have made significant contributions to the IS field. It could be argued that the unlimited access and autonomy permitted by the organisation, coupled with the length of the study (three years) at a period of extreme IS related change, presented numerous research opportunities. Nevertheless, this study circles on what really happened in one organisation when extreme IS related change occurred - the truth behind closed doors, how organisational actors acted, talked, didn't talk, argued, shouted, cried, reacted, interacted and got the job done. Alvesson (2002) described the understanding of organisational life at this level as 'micro-anchoring'.
which he argues is typically understood as implying a qualitative approach when conducting research. Due to the phenomenon under study in this field study, the research approach, qualitative, could be described as instinctive. With this in mind, care was exerted to ensure that this thesis was positioned strictly (when possible) within the IS discipline to ensure a valid and cohesive contribution to the previously mentioned cumulative IS traditions.

4.3.1 Qualitative versus Quantitative

"The "war" between the qualitative and quantitative is over."

(Markus 1997)

It is acknowledged that IS methodologies incorporate a diverse collection of research opportunities but for the purpose of this study the reflection of two of the most universally accepted methodologies will be referred to: quantitative and qualitative. Quantitative will only be considered on a peripheral level, as the research methodology that directed this thesis is qualitative (see Figure 4.1). Quantitative positive research is characterised and generally understood to include formal methods and techniques that facilitate IS researchers in their understanding of interaction of computers, technology and humans. There are expectations of quantitative research involving strict scientific evidence usually resulting in quantities or numerical conclusions gained through the interpretation of formal logical techniques. Chen and Hirschheim (2004) define quantitative research as typically using numerical analysis to illustrate any association among factors in the phenomenon studied; qualitative, on the other hand, places an emphasis on the description and understanding of the situation behind the factors.

It is accepted that qualitative methods are ideally suited when a research area is not known and so a hypothesis cannot be generated for testing (Jupp 2006). Resolute qualitative researchers suggest that the positivist approach to facts leaves no place for participants as agents and that many constructs do not really exist except in the social
world so cannot be investigated outside social interaction. Conversely, it is also argued that quantitative methods are best deployed when more is understood so hypothesis and research questions can be devised and tested. A major advantage is that data generated from quantitative methodologies can be subjected to considerable scrutiny and investigation (Jupp 2006). Qualitative research is concerned with exploring the subjective meanings about how individuals interpret the world and the different ways that reality is constructed. It may also be possible to conduct qualitative and quantitative research methods successfully for different purposes of the same study (Griffiths and Moore 2006). The debate continues regardless of Markus’ (1997) announcement that the “war” between the qualitative and quantitative is over.
Figure 4.1: Research epistemological for this research study is highlighted in bold print
4.3.1.1 Positivist

The ambiguity of positivist research epistemologies has previously been considered; this section will deal solely with qualitative positivist research. One of the first factors regarding this paradigm is that its foundations for research are anchored firmly within the natural sciences. It was, and for some still is, both established and acknowledged as the only correct method of conducting scientific research. There are accepted world-view characteristics by those researchers who work within the positivist paradigm, which are listed below in Table 4.1 using Oates’ (2006) definitions:

- **The world exists independently of humans**: There exists a physical and social world not just in our minds but one that can be studied, measured and captured.

- **Measurement and modelling**: The researcher discovers this world by measurements, observations, producing hypothesis and theories of how it works.

- **Objectivity**: The researcher is neutral and objective, an impartial observer. Facts about the world can be discovered independently of the researcher’s personal values or beliefs.

- **Hypothesis testing**: Research is based on the empirical testing of theories and hypotheses, leading to confirmation of refutation of them.

- **Quantitative data analysis**: There is often a strong preference for mathematical modelling and proofs, statistical analysis - the use of mathematical, logical, objective means of analysing observations and results.

- **Universal Laws**: Research looks for generalisation, universal laws, patterns or irrefutable facts that can be shown to be true regardless of the researcher.

Table 4.1: Characteristics of Positivism *(adapted from Oates 2006)*
Positivist research is generally concerned with using controlled instruments to test theories and hypotheses with an intention to 'increase predictive understanding of phenomena' of the natural world (Orlikowski and Baroudi 1991b). A criticism of this epistemology is directed at its application in a social setting. The social world or settings can include but is not exclusive to human relationships, interaction with artefacts, organisational dynamics, culture, and interpretations of situations. Additionally, individuals can interpret the same situation differently, with assumptions and values maybe changing over time or with additional knowledge. As a response to researching the social world rather than the natural sciences, alternative epistemologies evolved, namely, critical and interpretivism research. The following sections will expand on these two epistemologies in turn.
4.3.1.2 Critical

'IS research can be classified as critical if the main task is seen as being one of social critique, whereby the restrictive and alienating conditions of the status quo are brought to light. Critical research seeks to be emancipatory, in that it aims to help eliminate the causes of unwarranted alienation and domination and thereby enhance the opportunities for realising human potential' (Klein and Myers 1999)

Orlikowski and Baroudi's (1991) survey of research articles, which was discussed earlier, when examined for underlying epistemologies that guided the research direction, revealed a disquieting 0% of articles applying a critical stance. An assumption may be made that the review took place over fifteen years ago so that figure may have improved since. Chen and Hirschheim (2003) have recently augmented this analytical process and have reported upon continuing trends regarding the field of IS. However, Richardson and Robinson (forthcoming) are critical of this recent historical analysis and investigate why the critical paradigm is missing from the analysis. Their understanding and definition of critical research is obviously similar to Klein and Myers' (1995), that critical research aims to critique the status quo by exposing what may be believed to be entrenched structural social contradictions, with an aim to transform these restrictive and possibly alienating social conditions. The researcher's role could be viewed as shifting from an observer to an emancipator. Orlikowski and Baroudi (1991b) further add that the role of the critical researcher is to evaluate and transform the social phenomena under investigation. Positivism and interpretivism observe and report upon the status quo. Critical researchers extend their sphere of research activity by critiquing existing social conditions. Once an understanding has been gained and potential conflicts and contradictions are revealed this action may facilitate the combating of oppressive situations or social relations. Oates (2006) suggests that critical researchers aim to identify and challenge conditions of domination and the restrictions of the status quo and taken-for-granted assumptions. Oates' (2006) five common themes or characteristics of the critical epistemology that have been identified through the work of Habermas, Burdoueu, and Latour will be included (see Table 4.2):
• **Emancipation**: Critical researchers are committed to freeing people from power relations that shape organisations and society. Critical researchers do not just try and understand and explain; they seek to empower.

• **Critique of Tradition**: Critical researchers do not accept the status quo, but challenge it. Existing patterns of power and taken-for-granted assumptions are highlighted and then confronted.

• **Non-performative intent**: Critical researchers reject research projects that are aimed at improving and increasing managerial efficiency, whereby maximum outputs are achieved through minimum inputs (reduced manpower). Much IS research has been focussed upon meeting managers’ needs for maximising profits and enhancing their control and power.

• **Critique of technological determinism**: Critical researches challenge the idea that technological development follows its own rules and people and societies must adapt to the technology. They highlight that those with a vested interest in the technology may increase their power over others. Alternatively they argue that people and society can shape the technology that is developed.

• **Reflexivity**: Critical researchers question the possibility of objective, value-free knowledge (as sought by positivists). They argue that research projects in areas of development and knowledge are often controlled by those with power and vested interests. For example, governments can decide which research topics to fund and which to ignore.

Table 4.2: Characteristics of critical research *(adapted Oates 2006)*
4.3.1.3 Interpretive

Orlikowski and Baroudi (1991b:19) state that the aim of ‘interpretive research is to understand how members of a social group, enact their particular realities and endow them with meaning and so show how these meanings, beliefs and intentions of the members help to constitute their social action.’ It focuses upon the users’ perceptions of, and interactions within, the cultural context and the organisational environment. Interpretive researchers assume that the social world is not a given but one that is produced through social constructions, reinforced by individuals via their actions and interactions, language, consciousness and shared meanings. Social systems, structures, organisations and groups would not exist without humans, and interpretive research does not therefore predefine dependent and independent variables, but focuses on the complicated phenomena of human sense making as situations arise that cannot be measured, quantified, or categorised in an objective manner. Interpretivism aids the understanding of social phenomena of how humans view situations they are placed in and also the consequence of those situations (Kraatz and Zajac 1996; Braa and Vidgen 1999; Corbitt 2000; Ramiller 2002, Orlikowski and Baroudi 1991b). Oates (2006) has produced a pre-defined set of characteristics of this epistemology as she has with positivism (see Table 4.1) and critical research (see Table 4.2). These are shared worldviews of how interpretivism is perceived in IS and computing disciplines:
- **Multiple subjective realities**: There is no single version of truth and what we take to be real or knowledge is constructed in our minds, either individually or as a group. Different groups or cultures perceive the world differently.

- **Dynamic, socially constructed meaning**: Whatever reality is, for an individual or a group, can only be accessed and transmitted to others through yet more social constructions such as language and shared meanings and understanding. Language and shared meanings differ across groups and over time.

- **Researcher reflexivity**: Researchers are not neutral. Their own assumptions, beliefs, values and actions will inevitably shape the research process and affect the situation. Researchers must therefore be reflexive or self-reflective, acknowledging how they influence the research and how their interactions with those they are studying can themselves lead to renegotiation of meanings, understanding and practices.

- **Study of people in their natural social settings**: Research is aimed at understanding people in their worlds, not in an artificial world or laboratories as experiments. The natural settings are studied from the perspective of the participants and without the researchers imposing their outsider’s previous understanding or expectations onto the situations.

- **Qualitative data analysis**: There is often a strong preference for generating and analysing qualitative data - the words people use, the metaphors they employ, the images they construct.

- **Multiple interpretations**: Researchers expect that they will not arrive at one fixed explanation of what occurs in their study, but instead they will offer more than one explanation and discuss which if any seems the stronger because there is more evidence to support it.

Table 4.3: Characteristics of Interpretivism *(adapted from Oates 2006)*
An interpretive epistemology has underpinned the research process of the phenomena under study in this thesis; a study of organisational actors' responses to IS imposed change. The study focuses upon hegemonic language used by management to influence behaviour, aiming to understand how the workforce in this field study perceived the use of metaphoric language. A premise of interpretivism is allowing the use of workers' own terminology and images as part of the research process and examining the interpretation of the meanings and experiences that they have formed (Butler 1998). Orlikowski and Baroudi (1991b) argue that the distinction of critical research versus interpretivism transpires in the evaluation procedure. Interpretive research aims to determine and clarify the social situation whereby a nuance of critical research occurs in evaluating the social systems, understanding the intrinsic sense of their structures and with that knowledge helping enable empowerment for people to change those circumstances. A complexity of this study was that once the underlying social sphere of the research domain was unravelled, what was the responsibility to have this knowledge? This placed me in my dual role as a researcher and co-worker into a precarious situation, the decision to emancipate the workforce could also have been considered as an act of arrogance by a colleague. The workforce and my co-workers were and probably still are aware that they are being indirectly dominated and 'bullied'. They are also aware of the choices they have to eliminate the situation they are in - they could or should leave - but they choose to stay with the organisation; indeed, there is little staff turnover at the organisation, with the majority of staff being employed long-term. Nevertheless, there are casualties of this style of management and they will be reported in the following chapter.

4.3.2 Ethnography ‘a portrait of a people’

An aim of this research is to examine how metaphors were used to influence the behaviour of organisational actors to overcome resistance to IS related change ‘in situ’ (Schultze 2000), and how those involved reacted and dealt with imposed working methods. Ethnography, a portrayal of people and cultures in a particular setting, was the
obvious approach of data capture for this type of research study (see Figure 4.1). This study reveals, through official organisational discourse, unofficial informal narratives, and observed management bullying tactics, a kaleidoscopic view of an organisation in a unique place in time. This was a situation that could only be captured through understanding of the cultural ‘DNA’ and building a level of trust and respect within the organisational community. An in-depth and thorough representation was needed to ‘tell the story as it is’ (Beynon-Davies 1997:533) and letting the participants ‘speak for themselves’ (Schulze 2000) was essential. The ethnographer needs to spend time in the research setting to closely observe, record and engage with the daily life of another culture and then write about it (Schulze 2000). Typically, the ethnographer focuses on a community and creates a relationship with key stakeholders of the community, a cultural immersion; the process is to reveal the tacit knowledge and common cultural understandings that are indicators of the phenomena under observation. Ethnographic research necessitates commitment to gain close contact with the observed in their natural habitat, building a level of trust, to be factual and descriptive in reporting what has been observed (Bartunek and Myeong-Gu-Seo 2001). Schulze (2000) describes the role as ‘a sense-making and learning role rather than a scientific hypothesis testing one’.

Ethnographers are the research instruments, reporting on what they observe, their experiences, their interpretation of the social, cultural and economic aspects that influence the research setting. Each acts not as an outsider looking in but rather as an insider working within the company, absorbing the culture and company rules, creating relationships and very much contributing to organisational life and politics. The challenge is to combine participation and observation, so managing a dual role of both ‘insider’ and ‘outsider’.

Oates (2006) offers three types of ethnography: holistic, semiotic/thick description, and critical, and refers to them as three different types of schools, which is how they will be referred to in this explanation. The holistic approach follows the belief that empathy and a mutual respect of those under observation is necessary; the ethnographer should become a ‘native’ of the group or community, enabling a sponge effect, an absorption of the values and the beliefs. Reeves-Sanday (1979) warns that researchers who totally
immerse themselves in other people’s realities are never quite the same afterwards. This is due to a disorientation that takes place with the need to identify with, whilst to remain distant from, the process under observation. Participant observation does demand complete commitment to the task of understanding the phenomenon despite a somewhat acknowledged fact that the ethnographer can never completely set aside their own previous experiences and cultural ways in order to report on another way of life in an unbiased manner (Cazal and Inns 1998). This criticism maybe challengeable given the length of the field study and the level of understanding and empathy that was invested into the research process. Harvey and Myers (2002) warn that once access has been granted and immersion takes place, any embarrassing situations have to be dealt with tactfully through honesty and the development of relationships with those within the research domain. Any new member to the group will arrive with a degree of historical experiences, which the group may absorb, adapt or reject; the ethnographer will unconsciously arrive with some preconceptions but should be able to set aside the obvious aspects of their personal worldview in order to focus clearly on those under observation.

Alternatively, ethnographers from the thick description or semiotic school do not approach the observation process in the same way as those from the holistic school, since there is no need to become indigenous or to have empathy with those under study. This school focuses on the artefacts and symbolic forms that the group has, including words, images, rituals, behaviour, and then, through a process of cross-analysis of individuals and the whole community, a web of significance evolves. This results in a thick description of the community within a context. However, those adopting this school of ethnography should note the health warning if an adequate level of trust has not been established and the researcher is only invited into the public organisation, they may be restricted from viewing behind the scenes. The ethnographer must be agreeable with a touch of empathy or those being observed may not be willing to remove the protective layer we all hide behind to safeguard our real selves (Gummesson 2000).

The critical school of ethnographers makes the assumption that the behaviour being observed is influenced by hidden agendas, internal politics, and power monopolies that
suppress and hide the actuality. The role of the ethnographer is therefore to gain access behind the language and symbolic forms of the group, assuming a sense making and possible learning role rather than a scientific hypothesis-testing one (Schulze 2000). It could be argued that when conducting a holistic ethnographical study the researcher, depending upon the level of trust between the ethnographer and the research participants, is able to adopt a critical school approach and the two schools become entwined. In the experiences gained from this research study, one approach (holistic) automatically generated a dual approach in that the hidden and unspoken norms were explicitly made known to the ethnographer. A strength of this study, as earlier mentioned, was the challenge of combining a working role as an TCS Associate and observational role as Researcher so managing a dual role of both an ‘insider’ and ‘outsider’ as will be explained when the case data analysis is reported upon. Vickers (2002) argues that authentic insider research is becoming an acceptable research process because becoming ‘native’ or an ‘insider’ enables lucidity into processes, phenomena, group and individual dynamics, which are invisible to others or ‘outsiders’. ‘Going native’ allow access to a trust relationship that the insider as a researcher has built, which enables a certain empathy, with the ability to read between the lines. This process could be described as a unique research opportunity; as time and emotion has to be invested into the research circumstances, this nature of data cannot be captured via a survey or focus group. Both researcher and participant often reveal their true selves behind the organisational, professional masks, generating mutual respect and support (Vickers 2002).

4.3.2.1 The process of ethnography

Corbitt (2000) suggests that ethnography takes the researcher closer to the situation, allowing the in-depth study of a practical situation, permitting the ethnographer to develop theory from observation, because there is a need to understand social phenomenon in both its natural setting and cultural context (Darke, Shanks et al. 1998; Bartunek and Myeong-Gu-Seo 2001). Corbitt (2000) further suggests that the following four characteristics are common to ethnographical research:
1. Researcher participated in the natural setting of problem being researched.

2. Ethnographical study is flexible and changes as circumstances do – ideas change and that means the conceptual nature of the project can change.

3. Research is as much about the social process as it is about interpretation of that process by the participants immersed in it.

4. Data collection and analysis occur simultaneously.

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<th>Table 4.4.4: Characteristics of Ethnographical Research (adapted Corbitt 2000)</th>
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<td>These characteristics suggest an element of fluidity that could be observed throughout the research process of this study, as there has to be an element of flexibility when observing the organisation ‘behind closed doors’. The ethnographer is reporting on ‘live action’ that can be unpredictable, and although this contributes to fascinating organisational insights, it calls for an amount of preparedness to judge and react to situations immediately. Alvesson and Skoldberg (2000) argue that the crucial thing about ethnography is to have been there, and for that they suggest the researcher should be submerged for at least a year. The fieldwork here was conducted within the three-year association with the organisation, with the great wealth of the ethnographical study being conducted in the first two years.</td>
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<td>In this study, various forms of data generation activity was conducted. Each of the approaches will be examined independently though each contributed to the holistic research process. Early in the project, semi-structured interviews were conducted but it became evident that they were not productive so were stopped. The participants were reluctant to be taped due to the autocratic culture of the organisation and once in a formal interview context their behaviour altered significantly. Oates (2006) defines four different types of participant observation that will be explained in a following section. Using the author’s definitions, the ‘practitioner-researcher’ or the ‘participant-observer’ could both best define my role. As part of this role a research diary was kept, and this activity will</td>
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also be considered as a research tool. A third approach was text-based research, involving
the use of organisational documents to depict reality rather than whether truths or false
statements are presented (Silverman 2001). What should be regarded when considering
text-based research is what the documents are and what they have been used to
accomplish; they are social facts and evidence of how the organisation is socially
constructed in that they have been co-produced, shared and utilised in a socially
organised manner (Silverman 2001). Access to general company documentation was
unrestricted; obvious restrictions were placed upon personnel records, and certain
financial and strategic information, but there was an open culture with regard to what
organisational information was public.

4.3.2.2 An ethnographical methodological contribution

The decision to use an ethnographical methodology was a simple one given the
timeframe of the study, i.e. three years, the situation of the researcher, combining the task
of work and research and the phenomenon under study, an organisation undergoing IS
related extreme change. Ethnography requires the consideration of alternative
interpretations from those involved in the study. Gaining these multiple perspectives and
opinions enables a truly representation of any social or political conflicts that occurred
throughout the IS implementation projects. Other methodologies would not have given
the breadth of such insights. An ethnographical methodology allowed me, as an IS
researcher, to generate qualitative data whilst understanding the meanings that the Jarman
workforce ascribed to workplace artefacts and symbols. This then facilitated the
development of my understanding of how this organisation coped throughout the period
of extreme change. Harvey and Myers (1995) suggest that an ethnographical IS research
approach supplements the more traditional research trajectories that are predisposed to
focus upon the content rather than the process. As ethnographical studies are concerned
with actual real world situations, ‘it allows for relevant issues to be explored and
frameworks to be developed which can be used by both practitioners and researchers’
(Harvey and Myers 1995:22). This research methodology contributes to the cohesive
cumulative research traditions that provide the IS community with rich insights into the
human, social and organisational aspects of IS.
4.3.2.3 Semi-structured interviews

Conducting interviews was initially part of the research strategy. Semi-structured interviews had been the obvious choice because I was perceived as a co-worker who was also a researcher (See Figure 4.1). This mode should allow the interviewee the opportunity to initiate different threads of discussion about topics they perceive to be of interest and introduce alternative concepts that had not been anticipated, a conversational style. The interviews in this field study were initially conducted to deconstruct and understand the myriad of relationships, group dynamics and historical positions and movements of the organisational personnel. This is a process of ‘discovery’ (Silverman 2001) particularly if personal accounts and experiences are required, as they were in this instance. The decision to forgo interviewing the participants throughout the research period was made a matter of months into the process. There was reluctance to the interviews being recorded as interviewees were apprehensive of who would have access to the tapes, regardless of assurances of confidentiality, so there was a reliance on field notes. To some extent there was an issue of identity; my colleagues found it difficult to be interviewed formally about ‘office gossip’ by some one they worked with, and responded with statements such as “I’ll tell you later on, at lunch” or “I feel daft”. However, those same individuals consented to be interviewed by my research colleagues. Schulze (2000) in her confessional ethnography study of knowledge workers also started off with structured taped interviews but stopped for a similar reason to what I experienced. Interviewees were not candid when faced with a tape-recorder; she further found that such a formal process disrupted the continuity and trust she was developing. Similar to myself in my research endeavours, she did not want to jeopardise the observation of the in-the-moment reactions and behaviours in which she was interested. In retrospect, to conduct interviews together with observational activities over such long periods would not have been manageable or allowed by senior management. Interviews are resource-draining for both researcher and participant and require some commitment and enthusiasm from both parties.
4.3.2.4 Text: written and electronic documentation

Hermeneutics is the study of interpretation with particular consideration to the process of understanding text. Hermeneutics is perceived as an underlying philosophy and a specific approach to analysis (Myers and Avison 2002). Here I am concerned with hermeneutics as a mode of analysis, a way of interpreting text discourse. As Myers and Avison suggest, hermeneutics is concerned with both the meaning of text or text analogue (text analogue is an organisation that the researcher has come to understand through oral or written text); it asks 'what is the meaning of this text?' (Myers and Avison 2002:10). Ethnographical fieldwork recognises texts or documentation as legitimate research data, concerned with the way documents, tables, reports, e-mails, presentations have been constructed, by who, for whom (see Figure 4.1). This facet of the research process should not be neglected and offers an alternative perspective of the organisational setting. Oates (2006) separates the text, documentation into two distinct categories: found documents and research-generated documents. Found documents are texts that existed prior to the research, and are often in the public domain, such as profit and loss accounts, procedure manuals and production schedules training manuals. The second category, research generated texts, is put together for the purpose of the research and would not have existed otherwise. This may include drawings, observations and field notes generated by the researcher while conducting the research. For the purpose of this study both categories of documentation will be used, together with organisational documentation created by the practitioner-researcher. Documentation that will be utilised are meeting notes, e-mails (company-wide communication e-mails), business processes, business procedures, data-flows, project plans, schedules, reports, proposals, newsletters, websites, Gantt charts, marketing literature, training manuals together with observational notes, research diary and field notes. Silverman (2001) suggests the following list, to evaluate text based research, emphasising that it is the social organisation of the documents that is important irrespective of whether what is written is wrong right, true or biased, or how accurately they represent reality:
### How are the texts written?

- How are they read?
- Who writes them?
- Who reads them?
- For what purposes?
- On what occasions?
- With what outcomes?
- What is recorded?
- What is omitted?
- What is taken for granted?
- What does the writer seem to take for granted by the reader?
- What do readers need to know in order to make sense of them?

Table 4.5: Ethnographic questions about texts *(adapted Silverman 2001)*

### 4.3.2.5 Participant observation: 'the sounds of silence'

What differentiates ethnography from case study research is the degree of immersion of the researcher in the social and cultural context of the research domain. Case study is often dependent upon in-depth interviews of individuals within the domain as the key source of data generation and this is then supplemented by various forms of text and documented evidence. Ethnography differs as the primary source of data is generated via participant observation, supplemented by text and documented evidence. *(Myers, 1999)*.
Silverman (2001) adds that participant observation is more than just a data generation method; it also describes a social science resource adding that researchers cannot study the social world without being part of it. Oates (2006) suggests that it can involve senses other than sight - hearing, smelling, tasting, and touching. This methodology has gained acknowledgement by some of the IS community’s leading academics, with Orlikowski spending over eight months collecting data by means of observation participation, including informal contact and conversations with the research participants (1991a).

A strength of ethnography is that it is ‘being there’ - it is ‘intensive’, observing what has been said, how it was said and what was not said. Observing the participants at Jarman over a long period of time enabled an insight into how user resistance was dealt with in a covert manner that would possibly not have emerged through interviews alone. As a new employee who was starting the research process in tandem, there were no redefined assumptions or expectations to disregard about the organisation or those inhabiting it. The canvas was blank and the flavour was vanilla. In this regard, so was the observed phenomenon; there was no guarantee that something would emerge but a probability when observing an organisation undergoing extreme technological change. The use of metaphoric language at the organisation was evident from the outset; this aspect of organisational life was recorded and additional evidence collected. As the participants/organisational actors began to adjust and react to IS change, the use of metaphors by senior management altered considerably. How individuals reacted to the change in working conditions and responded to the explicit use of metaphors to avert potential resistance was unexpected but significant. In this instance, participant observation over a period of time enabled this phenomenon to be recorded. Furthermore, the use of this hegemonic metaphoric language was observed being used in two instances that would not have been captured by an ‘outsider’. For example, at a Jarman bi-monthly management dinner, a very public heated conversation between the MD and the Management Consultant ended with the MD shouting “Oh, don’t be such an Eeyore!” On another occasion, in the ladies toilet, during a conversation between the Sales Manager and the Research Assistant about a member of staff from another office, the question was asked, “don’t you think she can be really Eeyorish?”, the word ‘Eeyorish’ being said slowly and drawn out. The metaphors had become rooted into acceptable organisational talk.
An ethnographer is someone who writes about people, so there is an important emphasis on writing up the data. As a general rule field notes should be written up on a regular basis, that is, observations, impressions, feelings and reactions, and also, if possible, the circumstances. ‘It is difficult to overemphasise the importance of meticulous note taking. The memory should never be relied upon, and a good maxim is “if in doubt, write it down”’ (Hammersley and Atkinson 1983). I would add to that ‘if the situation and time allow’ as that view is very much an idealistic perspective if you are a practitioner researcher, as I was. Notes were taken as and when something of interest occurred, or as it was happening on some occasions, but the reality was that notes were written up in the evening or in a lull period in the working day in a reflective manner. Elements of these reflection exercises will feature in the case data chapter, including an ongoing struggle to understand why certain organisational actors remain in such a ‘chilly’ (Faulkner 2004) workplace. There is always the issue of validity regarding aspects of this mode of research, as there is much reliance on personal observations and assumptions. However, I am working in the interpretive tradition where this approach is a ‘fact of life’.

4.3.2.5.1 Non-Verbal Language

Symbolic language is equally as revealing as the taped conversation, the observation of body language, facial expressions, gestures, how you walk or sit, how individuals clothe themselves - formal, informal or camouflage (Gummesson 2001). Organisational artefacts and symbols no matter how insignificant can often contribute to the rich picture, Mont Blanc or biro, Hugo Boss or Marks and Spencer’s or bone china in preference to a coffee mug. These examples of non-verbal language offer an alternative set of characteristics when constructing the disposition of organisational players. ‘Non-verbal communication is the only language used throughout most of the history of humanity… you use this preverbal language, consciously and unconsciously everyday to tell others how you feel about yourself and them’ (Hall and Hall 1977). In addition, it is not only your physical attributes that expose additional insights, awareness of your spatial presence and your treatment of time; arriving late to make an entrance or fumbling in late once a meeting has started. This mode of research is also referred to as unobtrusive or non-reactive techniques, watching as well as listening (Silverman 2001).
Oates (2006) lists the advantages and disadvantages of this mode of research. On the plus side, the process is cheap to carry out and provides a means of gaining a rich insight into a social setting, producing an holistic understanding of complex situations, whilst finding out individuals' beliefs and values as they see them. An additional benefit is that the practitioner-researcher, such as in this study, can research while they work (Oates 2006). Hand in hand with the advantages are the disadvantages of participant observation, the most obvious one being that the researcher can only observe what is seen and cannot be everywhere. This argument can also be made with other modes of research - when interviewing there is a reliance on the interviewee, while with questionnaires there is a reliance on the participant answering correctly. If the researcher misses a main event others may be encouraged to relay their version of events for a comparison. Access is often an issue, although not for this study. Participant observation can lead the researcher into risky areas, socially, politically or legally, but most research processes can attract levels of vulnerability. It is sometimes argued that there is a lack of reliability, as the research is from one perspective and may be biased and impossible to replicate. Nevertheless, Schulze (2000) adds that like all scientific research, ethnographies are still expected to convince the scientific community of the reliability of the phenomena under study as it becomes difficult to generalise any findings that may be unique to a particular situation studied. Allen and Baskerville (2003) propose that generalisability is a major concern for researchers, given that it refers to or hints at the validity of a theory in a setting that is different from one where it has been empirically tested and validated. The generalising of an IS theory is important not just for research purposes but also for managing and problem solving in industry and society. On this basis, it can be argued that generalisability is a key characteristic of the positivist philosophical tradition, establishing universal laws of the phenomena under study. Where then does that leave this ethnographical study? The ethnography study undertaken in this research process sits within the interpretive philosophical tradition that potentially places no particular emphasis on generalisability. In looking for direction Allen and Baskerville (2003) argue that with the interpretive tradition the validity of a theory only having relevance in the setting where it was developed does not really detract from its validity or scientific status.
'At the same time, interpretivism would not prohibit the researcher from extending his or her theory to additional settings. A key feature of interpretivism that differentiates it from positivism, and hence also differentiates its approach to generalisability from positivism's approach, is that interpretivism acknowledges the existence of a phenomenon that is not present in the subject matter studied by the natural sciences. People, who are integral to the subject matter that a social scientist observes, develop and use their own subjective understandings of themselves, their setting, and their history.'

(Allen and Baskerville 2003).

Given this standpoint, it could also be argued generalisation is a strength of this ethnographic study, the observation of key organisational actors within their familiar settings. Participant observation has the capacity to reveal much more than formal interviewing, or circumstances in which researchers are invited witnesses presented with an artificial portrayal of the organisation. There are advantages and disadvantages of most research techniques, and in each case what is most important is to be aware of the disadvantages and ensure that the research is robust and relevant.
4.3.3 Evaluation of the Research

Klein and Myers (1999) set of principles for conducting and evaluating interpretive research will be used to evaluate this study. This is a tried and tested set of principles and the actual evaluation can be found in Section 7.2. In addition Atkinson and Hammersley (1994) will be used to evaluate the ethnography dimension of this study. Atkinson and Hammersley (1994) identify four problem areas of fieldwork in their study on ethnography and participant observation. These problematic areas are listed below along with a response from the field study events experienced in this research.

Is the researcher known to be a researcher by those being studied, only be some or by none? Yes. Within the organisation it was well known that research was being undertaken. My role as Teaching Company Scheme (TCS) Associate, supported by staff of the University of Salford, was a pivotal one in the company’s expansion, due to a significant IS investment. The workforce became desensitised to research activities and to academics being regularly present. The MD would often ask who was going to be cast as him in the film, and always suggested Mel Gibson for his role and Jodie Foster for mine.

How much and what is known about the research, and by whom? Essentially, there was an understanding that organisational activities and processes were under scrutiny. The sharing of knowledge both ways, a mutual partnership, was part of the TCS project package. The company exploited the University’s expertise and virtually had an on-tap strategic management consultancy, while the university had access to the company for research purposes. There was no real interest by management as to what was being researched; often in meetings it was joked that staff were ‘not to say anything, walls have ears’, but there was no distinction between my dual roles of researcher and TCS Associate.

What sort of activities are and are not engaged in by the researcher in the field, and how does the researcher locate various conceptions of category or group dynamics
used by the participants? Using ethnographical techniques and positioning myself as an insider, group dynamics, inter-relationships, friendships, and the cultural context organisational activities occurred within were swiftly understood. Activities that could be described as not fully engaged in were interview activities. Interviews were initially part of the data generation but almost immediately became a redundant option. To formally interview members of the workforce could possibly re-establish my role as a researcher in the workplace rather than a co-worker, but what emerged was a significant difference in participant behaviour - they became reserved and hesitant of what was expected of them, often referred to as the Hawthorn Effect’ (Oates 2006). A rapport between the key stakeholders was essential in this research. The organisational workforce was predominantly women and it is questionable whether I would have been included so readily had I been male (Silverman 2001).

1). Inclusion into the collective groups was essential for both roles (co-worker and researcher) and to be accepted by the senior management would make or break the whole IS project of which the research was a subdivision. Acceptance into this volatile organisational setting was achieved, as discussed at length in the following ‘Case Data’ chapter.

What is the orientation of the researcher - are they an insider or an outsider? There were four researchers that had access to the organisation throughout the research process. The researchers’ orientations were completely defined; this was an organic process because of the structured roles each researcher had in the IS implementation.

Researcher 1 = myself

Researcher 2 = lead advisory academic (who is still working with the company)

Researcher 3 = advisory academic

Researcher 4 = advisory academic
4.3.4 Limitations of ethnographic fieldwork

Ethnographical fieldwork is resource-draining and involves a degree of frustration on a personal level, as the data generation process can appear endless. It takes a long time to conduct the fieldwork and also a long time to analyse it and write it up. Myers (1999) advises that the best opportunity to do ethnographical fieldwork is for your doctoral studies because of the investment of time required. There was no end to the amount of documentation that could be accessed, or observations made, even though the research problem was defined. When in the midst of the research, there was almost a choking or suffocating feeling of what to record or what to dismiss. The constant search for what data will make good research and a fear that important events are being missed, or not having the opportunity to record activities instantly, was often present. The phrase 'you
cannot see the wood for the trees’ describes the situation accurately. Silverman (2001:61) advises ‘less is more’ and to limit the amount of data gathered to what can be realistically analysed. Arguable this depends on a range of factors, firstly the experience of the researcher, a novice researcher requires a little flexibility in the initial decisions that direct the research process, as a strict definition of the research objective maybe needed to extract precise data. It is natural for the researcher to revise the situation if the phenomenon under study is not what is expected, and there should be room for flexibility and intuition; indeed, shifting focus when interesting data emerges is a strength of observational research (Silverman 2001).

There is some debate regarding the study of something with which one is heavily involved, but it can be argued that personal involvement can be considered a valid resource to the researcher (Alvesson 1999). As highlighted earlier, it is advisable to write up notes instantly and not to rely on memory (Hammersley and Atkinson 1983), but the reality can be different when conducting an ethnographical study in a practitioner-researcher mode when time is often a luxury. While working and researching, decisions have to be instantaneous - often you are perceived as a work colleague first and foremost rather than a researcher. Research activities had to be secondary to the job, otherwise uncertainty and possibly distrust would replace camaraderie and alliances. Familiarity of the situation and of the organisational actors involved in the research can help facilitate the writing up of field notes post-event, for example, facilitating a collective mind dump in a car journey between satellite offices. Again, the notion of amassing mountainous levels of field data is ill-advised; progress should be accessed, research objectives revisited. As a practitioner-researcher, this has to be strictly policed and self-monitored. Researching while working is time-consuming, and for this research study the period of observation was planned over a long period so self-imposed deadlines could easily slide (if not for a diligent supervisor).

Another limitation of ethnography work is that it is in-depth knowledge of one research context, one phenomenon and one organisation. However, generalisations may stem from the knowledge acquired from one study, and it can be argued that an ethnographical study makes a similar contribution to a single case study.
4.3.5 The Dual Role of Researcher

The management of the two roles, as Associate and as Researcher was not as problematic as it could have been had I any previous experience of either role. The TCS role closely followed my graduation and this was my first major piece of research as an independent Researcher. This actually meant I had few expectations. The Associate’s role was the day-to-day management of the programme of work that was set out for the TCS project. This programme of work was a detailed plan with target outcomes plotted over a two-year period. The project had to be closely monitored throughout its duration, and progress against activities scheduled on the project, targets and deliverables were formally reviewed at monthly progress meetings. There were regular four monthly meetings with the key stakeholders of the project attended by an external regional consultant from the TCS programme. Alongside this extensive project I pulled on my Researcher’s hat to undertake my ethnographical study. The workload was intensive and, on reflection, there was a significant level of responsibility resting upon the success of the project.

Not only was I managing the project but I was also supporting all the burgeoning IT needs of a growing group of IT users that were geographically dispersed around the UK. I would often find myself in the South East on one day and then the South West the following day, either upgrading or maintaining the IT infrastructure. It immediately transpired that I had been given the overall responsibility for any technology within the company, having been asked on more than one occasion to repair a telephone system and a microwave. These additional tasks were definitely not listed in my programme of work and I also had Rupert to contend with. A working relationship was established with a lot of compromises but I survived. In some ways there was a degree of mutual respect between us and with the support of the University reinforcing that I was a visitor at Jarman, albeit for three years, the TCS was a success. Jarman, all be it for three years the TCS was a success.
4.3.6 Role of the Researcher: an ethical dilemma?

This study has been anonymised and an embargo will be placed upon this thesis to protect the organisation and individuals within that organisation. The research direction of this thesis has always had to be anonymous due to the nature of the phenomena under observation. Anonymity enables certain taboo subjects to be researched and pushed into a public domain, to avoid embarrassment or the triggering of an angry response. In this instance, confidentiality and anonymity were chosen over 'rational rhetoric' (Gummesson 2000), as to be explicitly honest is more edifying than implicit safe stories, and allows for robust research findings. As the researcher and a close associate within the organisation there was always the understanding that I was recording and observing working practices. My research role became familiar and the staff became accustomed to the notion that I was working but also researching the organisational processes. The ethical position of the ethnographer becomes particularly ambivalent when the study is conducted at their workplace (Beynon-Davies 1997). As time went on it was becoming obvious that the major research interest was the unpredictable and erratic behaviour of the MD and its influence on the organisation. The MD had a constant joke that he wanted Mel Gibson to play him 'in the blockbuster', asking, for example, 'how would Mel Gibson deliver that line, “What are the November sales figures for the Midland office?”'. While he had the capacity to control and manipulate there was also a good deal of humour when the moment was right. When, however, the moment was wrong I have observed shouting, ranting and finger pointing in the face of a member of staff who did not put biscuits on folded blue napkins to accompany a cup of tea for a new client. In my dual role of ‘insider’ and ‘outsider’ I was fortunate to observe both sides, as he would confide in me (I was degree educated and lived in a major city an hour’s drive from the country-based organisation) that his ‘staff had or showed little ambition, and that is why I want to recruit from outside the area, get some graduates in with broader outlooks. Locals are small-minded and watch too many soaps.’ His workforce was predominantly made up from the local population and this was replicated across the larger regional offices. I chose to present a frank and honest observation, choosing to anonymise the research domain and participants to avoid unnecessarily hurting individuals and creating any unpleasantness. In this choice I was following Gummesson’s (2000) comments that, although such
frankness is unusual in business literature, reporting these taboo areas is essentially important and that if left out of the research process the descriptions would be unreliable.

4.3.7 Conclusion

Adam and Fitzgerald (2000) argue that there is growing evidence that the IS field has been moving towards divergence rather than convergence, with research addressing new debates rather than continuing to fully mature existing research issues. With this warning in mind, this research aimed to provide a comprehensive review of IS literature in two research areas - metaphors and user resistance – with an objective to contribute to an ongoing problematic situation of introducing new technologies to organisational settings. This chapter reports how that research aim was achieved by using a qualitative research methodology with an interpretive epistemology underpinning the process. A three-year ethnographical study was selected to guide the data generation process, which was predominantly participation observation, supplemented by documentation analysis. Conducting a case study was decided against, as there was a full immersion into the organisational social and cultural context; the practitioner-researcher orientation was 'insider' mode. The following chapter introduces the case data: the organisational setting, the organisational actors and a chronological timeline of events and activities throughout the research period. The timeline of events will include the two major IS investment projects, and anchored to this linear view will be the management response and the workforce's reactions to what was extreme organisational change, that is, the use of metaphors to avert user resistance.
5 Jarman: the Research Domain

'Tiggers are wonderful things.....Their tops are made out of rubber.....The bottoms are made out of springs.....They're bouncy, trouncy, flouncy, pouncy.....Fun, fun, fun, fun, fun.....But the most wonderful thing about Tiggers is.....I'm the only one.....The wonderful thing about Tiggers.....Is Tiggers are wonderful chaps.....They're loaded with vim and vigor.....They love to leap in your laps.....They're jumpy, bumpy, clumpy, thumpy.....Fun, fun, fun, fun, fun.....But the most wonderful thing about Tiggers is.....I'm the only one.....Tiggers are cuddly fellows.....Tiggers are awfully sweet.....Everyone else is jealous.....That's why I repeat.....The wonderful thing about Tiggers.....Is Tiggers are wonderful things.....Grrrrrrrrrrrrr ! ! ! !'

5.1 Introduction

This chapter presents data from the ethnographical field study that was conducted over a three-year period at management consultancy Jarman, based in the North West of England. The research period lasted from December 2000 until the winter of 2003. Throughout this period, Jarman experienced two major IS investments, referred to in the chapter as Phase 1: Migration Project and Phase 2: the Client Tracking Project. This was a period of extreme change for Jarman as technology had enabled a rapid geographical expansion from two sites to six sites across the UK. The chapter begins with a comprehensive introduction to the organisation and its workforce, including vignettes of the key organisational actors, business processes and functions. The two IS investment phases are dealt with in isolation; these include drivers for change, and a detailed review of each project. Due to the nature of this 'insider' study, observing events at close hand, it was difficult to separate the presentation of the generated data and the analysis of the data. For a sense of continuity, the case data and the case analysis are interwoven and presented as such, as to separate the two areas distinctly would result in a disjointed flow. The overall research aim is to explore the use of metaphors in an IS project. The
following case analysis chapter positions these research concerns, the use of metaphors to coerce certain users into compliance with management aims avert user resistance, against the metaphor and user resistance literature discussed previously.

5.2 Jarman: the research domain

Jarman, a management consultancy based in the North West of England, played host to the research domain of this study. The ethnographical research process was conducted over a three-year period from Dec 2000 to the end of 2003. This timeframe witnesses Jarman experiencing accelerated growth from a two-site organisation with a workforce of twenty, to a six-site organisation spread across the UK with a workforce of up to forty-five and increasing. IS investment was significant, with the adoption of innovative technology in supporting the expanding community. The research methodology chapter elaborated upon the data generation process for this project, primarily, the use of participant observation, and documents, including both found organisational documents and research-generated documents. This project has generated a vast amount of data. The empirical data included in this chapter will provide additional verification of metaphors being used to avert user resistance to IS related change. In order to present a logical structure of events, technological change within the organisation will govern a project timeline (Table 5.1). Any significant historical episodes outside this project timeline will be discussed for continuity and the presentation of the holistic research domain. These include the planning and design of the IS implementation projects before the research process began and post IS activities after the completion of the research project.

There were two significant IS investment phases during the lifetime of the observation participation research process. IS investment Phase 1 was known as the Migration Project and involved the migration of an obsolete Apple Mac platform to a PC platform. The second IS investment project, Phase 2, was known as the Goldmine Project. The initial objective was to track the client’s journey while at Jarman, but this project altered beyond

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8 A pseudonym
recognition as the senior management became exposed to emerging workflow technologies under the guise of Customer Relationship Management (CRM) systems. The client’s journey was supposed to be dealt with in isolation but this rapidly altered to include all of Jarman’s business functions. Throughout this period the organisational actors experienced extreme changes in their working practices. The reaction (possible resistance) and response (metaphor use by management) to these changes are reported throughout the study. The identified user resistance activities and metaphor usage at Jarman will be mapped over this timeframe as and when they were observed and recorded. An attempt was made to structure a chronological view of the user resistance and metaphor occurrences but phases and interludes overlapped, so an almost layered structure evolved.
5.2.1 The Organisational Setting

Jarman is a leading management consultancy, predominately concerned with career guidance of senior management professionals, usually at senior executive level. They provide guidance in finding new roles for those who have been made redundant or to deliver performance improvement training for those in the midst of a career change. This is done through processes of mentoring and networking, facilitated by personal Management Career Consultants. The marketable products were expertise, capability and professionalism, with the team of Managing Career Consultants referred to by the Managing Director as “greyed haired gentlemen, not gelled hair young thrusters” to
potential clients. The consultancy claimed a 100% success rate in guiding its clients through a precarious phase of unemployment and ultimately attaining new professional roles. Jarman provided a bespoke career guidance service, so distancing itself from standard recruitment agencies that offered advertised job opportunities. Jarman differentiated their service by focusing more on networking, mentoring, construction of specific sector knowledge banks, identification of management gaps, and conducting speculative letter and CV campaigns. Clients did not pay for this service so were in fact not the customers. The people who paid for Jarman services were previous employers, who would provide such a career service bundled in with redundancy packages. Jarman had to build relationships with Human Relations directors and managers, because for larger organisations they made the decision on which careers guidance company to choose. That is not to say the actual clients did not have an opinion, as they too had to be happy with the service. If redundancies were happening due to restructuring or downsizing, Jarman could expect a number of new clients. Jarman provided a broad spectrum of services to provide for every possible scenario of careers guidance, and there were alternative programmes for each management level down from senior management, through middle and junior management, down to the shop floor worker (for whom an on-site service was provided). A member of the team would set up a careers services, CV templates, online access to recruitment agencies and industry intelligence, and an experienced Management Career Consultant would be made available.

The on-site services were profitable but the real ‘bread and butter’ came from the senior executive packages. As they started their ‘client journey’ with Jarman the clock began to tick. Their previous employer (the sponsor) would pay for a six-month careers package. If they found a job in a matter of weeks, which did happen, Jarman would still receive the full six-month payment. However, if the client was difficult to place the Management Careers Consultant often commented that they were lingering around “like a bad smell”, consuming services after the six-month period had run over. On the whole, most clients were successfully dealt with within the six-month payment period but there were instances where it became apparent why certain clients had been made redundant: they were inept and had became unemployable. Jarman’s mantra was to ‘reduce job search
time’, ensuring the senior executive’s ‘client journey’ was fast, but without the sense of being rushed.

5.2.1.1 The TCS project: What placed the researcher there?

An act of serendipity presented this mature student with an opportunity to begin her career in IT under the safety net of a Teaching Company Scheme (TCS), working in the ‘real’ world, while still being attached to a University or knowledge base. The TCS has been recently renamed and re-branded as the Knowledge Teaching Programme (KTP5), which is a three-way partnership including: a University, providing the knowledge and guidance through a team of academics, together with the administrative infrastructure to facilitate the funding process; innovative companies that require access to skills and expertise to help development, with managers prepared to embark on an arduous two-year project plan, while also providing a portion of the funding, and the employment opportunity; and the Associate, usually a graduate, who actually project manages the operation and performs the work, at the same time as gaining a unique opportunity and normally exclusive experience. I was the Associate for this TCS from winter 2000 to winter 2002, with an additional year being employed to complete a CRM implementation project that overran the forecasted two-year programme of work. This scheme was partially funded by Government organisations led by the Department of Trade and Industry (DTI) and the Engineering and Physical Sciences Research Council (ERSRC). Working with academics from the University, the TCS Programme enabled the company to dramatically improve its business information systems, align these with its business strategy and create the in-house knowledge to continue the development. The academics provided the expertise to enable the company to exploit leading edge thinking on IS/IT such as the potential for intranets, the Internet and customer relationship management systems. The notion of a three-way partnership gives an impression of some degree of egalitarianism being present, but while such relationships may be present among other TCSs, this was most certainly not how the partnership worked at Jarman.

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*See [http://www.tponline.org.uk/default.aspx](http://www.tponline.org.uk/default.aspx) for further details of this scheme*
5.2.2 Jarman’s Historical Timeline

Rupert Green, the Managing Director (MD) of Jarman, set up the organisation in 1990. Sarah, who was Rupert’s PA when he was employed in the publishing sector, was a co-founder of Jarman. There is little information available regarding this union and the two individuals rarely elaborated upon the intimate official details on the contract. What were always referred to in meetings, with visiting clients and in general conversation, were the ‘hard times’, the incredible ‘hard work’, and the ‘unquestioning support’ of Sarah throughout the ‘lean times’. This was a partnership that won a regional entrepreneur competition, which had carried significant prize money. Jarman was established in 1990 and it took four years for the company to establish itself enough to opening a second office, in Thames Valley. The two offices were initially connected via telephone and fax machine. The four years from 1998 to 2002 witnessed an accelerated growth as Jarman opened a flagship office in the Midlands, thereby obtaining a broader geographical spread. The first major IS investment project took place in 2001, the main aim of which was the utilisation of technology to improve Jarman’s business information systems and align these with its business strategy. The project also aimed to be pro-active in harnessing emerging technologies that would develop new business areas, and focused upon core activities delivered by an integrated system. A virtual networked community was made possible using Virtual Private Networking (VPN) technology. From 2002 to 2006 (after the research project) the expansion continued to the intended nine offices throughout the UK. Jarman realised as they started to expand in the 1990’s that in order to compete with larger competitors and satisfy geographically-dispersed corporate clients it had to provide its services and programmes more widely throughout the UK.
5.2.3 Who’s Who at Jarman (Organisational Actors)

Jarman altered significantly during the project lifespan. In Winter 2000, when I first started at Jarman, an office memorandum appeared in the empty in-tray on my desk. The memorandum had a list on it with the names of the people who should receive a copy and my name was highlighted in yellow highlighter pen. Watching as the memorandum was delivered by hand to other desks in the office, each with yellow marker highlighting different names, I was curious as to how the memorandum was delivered to those on the list who were located in the other office. I was told that they were faxed across to the offices or posted to those on the list that had no access to a fax machine. In 2003, when I was leaving Jarman, a company wide e-mail would have been sent in a matter of seconds.
to all company personnel, both office-based and mobile. Additionally the company personnel list would have altered significantly to support the growing enterprise. Table 5.1 displays ‘who’s who’ at Jarman, a list of personnel from the start of the project to the end. The workforce doubled in size, contributing to an almost adrenaline-fuelled period of anticipation and anxiety.

There was a real divide between management and the general workforce. I was quickly accepted into the organisation as ‘one of the us (regular workforce)’ rather than ‘one of them’. There was a distinct hierarchy that others aspired to join. Those that considered themselves an elite group would be the MD, his wife, the non-executives (though not the Chairman, who was incredibly agreeable), the Regional Manager (or BDMs), almost all those individuals who were supported by administrators. There were a couple of exceptions to the norm but on the whole there was a divide. In my role as a TCS Associate I did not fall comfortably into either camp so was accepted on some level in both. The elite camp was predominately made up of managers, who were capable and professional in their attitude and work. Their attire was suits (including for female staff) normally pin striped, ties and shirts with cufflinks, highly polished shoes, and long socks on a man. Rupert “despised dirty shoes” and said that “if you are going to cross your leg, well, then be prepared for it”. I was told “it is all about presentation, my dear” after spending eight hours under desks re-routing cables and then being requested to attend an impromptu meeting, with unkempt hair and dirt marks across my face.
**Senior Management Team at Jarman:**

**November 2000**

1. Chairman (not a staff member)
2. Finance Director (Rupert’s wife and not a staff member replaced in 2002)
3. Non-Executive Director (not a staff member)
4. Non-Executive Project Consultant (not a staff member)
5. Managing Director (Rupert)
6. Client Services Director - senior sales person (North)
7. Operations Manager (North)
8. Regional Director – senior sales person (South)
9. Regional Director - senior sales person (South)
10. Regional Manager (South)

**September 2003 – Additional Staff**

11. Regional Manager - senior sales person (South)
12. Regional Director (Midlands)
13. Regional Manager - senior sales person (Midlands)
14. Regional Manager - senior sales person (Bristol)
15. Regional Manager - senior sales person (South)
16. Regional Manager - senior sales person (North)
17. Regional Director (Senior Management for the South)
18. Senior Managing Consultant – co-ordinated career consultants (North)
19. Regional Manager - senior sales person (Scotland)

20. Regional Manager - senior sales person (North West)

Research team:

1. Research Manager (North)
2. Research Assistant (North)
3. Secondary Researcher (North)
4. Client Services Co-ordinator (South)
5. Research Assistance (North part time)
6. Research Assistance (North part time)

September 2003 additional staff

7. Researcher (Midlands)
8. Clerical Assistant (North)

Tele-Sales team:

1. Client Services Manager (North)
2. Telemarketing Executive (North)
3. Telemarketing Executive (North)
4. Corporate Appointments (Part Time North)

September 2003 additional staff

5. Telemarketing Executive (North)

Administration:

1. Administrator/receptionist (North)
2. Administrator/receptionist (South)
3. Office junior/Research Assistant (North)

**September 2003 – Additional Staff**

4. Receptionist (North)
5. Administrator (Midlands)
6. Administrator (Bristol)
7. Rupert’s PA (North)
8. Administrator (London)

**Finance:**

1. Executive (accounts) Assistant (North)

**September 2003 – Additional Staff**

2. Executive Assistant (North Part Time)
3. Executive Assistant (South)

**IT:**

4. IT Manager/Researcher (North)

**September 2003 – Additional Staff**

5. IT Manager (North)

**September 2003 – Additional Staff**

**Marketing:**

1. Marketing and Services Managers (South)
2. Marketing Assistant (South)

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Table 5.1: Who’s Who at Jarman - November 2000 and September 2003
The Organisation Chart in Figures 5.3 and 5.4 (names have been concealed to ensure confidentiality) depicts the Jarman hierarchical structure in 2000. The workforce had been subdivided into the two office locations, North (Table 5.3) and South (Table 5.4). A further sub-division was whether your role was supporting the Client or the Sponsor who actually paid the invoice.
Figure 5.3: Jarman Organisational Structure (North)
Figure 5.4: Jarman Organisational Structure (South)
5.2.3.1 Vignettes

The subsequent vignettes of some of the key organisational actors from the Jarman workforce and researchers from the University of Salford allow for a more complete picture of the individuals involved in this period of IS change. This added dimension of the collected qualitative data offers an insight into the different characters and may also help relay an insider's understanding of the research setting. The names of the individuals have been changed to ensure confidentiality.

Rupert Green, the 55-60 year old Managing Director of Jarman, was passionate about his family business. Born in India, he was privately educated in England at various boarding schools from the age of seven years. He considered this character building, to the extent that his children attended one of these same boarding schools. This autocratic leader was dynamic, influential and commanding. He had the capacity to be charismatic but also had the potential to be cruel. Rupert was loved and loathed by his workforce and when he was in the building everyone, including his son, stood to attention. As soon as his sports car (British built, of course) roared into the company car park everyone scattered, from directors to receptionists. Rupert always referred to himself in the third person - for example, 'Rupert Green needs a meeting ...TODAY' or 'Rupert Green is immensely happy to introduce...' - and after a short time in Rupert's company this seemed perfectly normal. In induction presentations for new members of staff, the famous 'I want you for the US Army' propaganda poster is used, with Rupert's face superimposed over James Montgomery Flagg's face. Though amusing, the underlying message is 'come and join my army here at Jarman'. Another flamboyant act that became part of Jarman history was the time Rupert walked on stage to the 'Eye of the Tiger' music featured in the Rocky movies. He was very much the showman.

Charles, the 55-60 year old Finance Director, was an ex-client - a fact that almost became a marketing slogan, and was almost always mentioned during any introduction to
Jarman’s services. A hugely successful career with a multinational organisation ended in a large redundancy package including the services of Jarman to provide a bespoke career guidance service. Charles was recruited to Jarman at the height of its expansion ‘because we need somebody to take over at the wheel’. Rupert realised that Jarman was outgrowing his personal expertise and strategic financial direction was becoming essential. However, Charles had a placid personality with good intentions and barely coped with the change of working environments from a multinational to a local SME located in a business park. Always impeccably dressed, with a permanent suntan, it was obvious to all that he was working up to an early retirement. There was a sense of regret from the workforce as they realised that Charles was going to be neither influential nor a decision-maker. He never once stood up to Rupert.

Sarah, the 35-40 year old former PA to Rupert, was a co-founder of Jarman, and eventually a Client Services Director and member of the Board. Her role as co-founder was a minor one on paper but she supported Rupert relentlessly throughout the initiation of the company. Sarah used to openly say that she had given everything to Jarman, even her first marriage. The relationship between Sarah and Rupert was turbulent. When sales figures were up, life was great, but when sales figures were down, Sarah would be openly humiliated. One of the first times I encountered Sarah was as I walked into a meeting room as Rupert walked out. She was sat at the table in tears. As the other staff members came into the meeting they ignored this fact (it soon became apparent that this was a common occurrence) but another female regional director came to Sarah and said, “I thought I told you to stand up for yourself,” and said over to me, “and you are going to scare Marie!”. Sarah enjoyed her status in the company and was a good saleswoman but ineffective in her role of managing people or organising herself. Like Rupert she was unpredictable, borrowing aspects of his caustic management style and she too could be cruel at times. In lighter moments she could show empathy to others but would only show support in private and would never confront Rupert. Sarah fulfilled a number of roles at Jarman; a verbal punch-bag for Rupert on off days, she also presented a sense of permanence, a cohesive presence for long term clients. She was his ‘yes woman’. 148
Scan was a 45-55 year old highly experienced Managing Consultant whose role was to manage the team of self-employed career consultants at the Head Office site. Another responsibility was to standardise the Career Consultant activities throughout the other regional based offices and reporting these activities to the senior board members. This was, in hindsight, an impossible objective, not just because of the geographical spread of offices, but for the fact that the career consultants at Jarman were all self-employed and had personalised working procedures. There was a mutual relationship established, in that the consultants came and went as they pleased – taking holidays, working at other consultancies - but in reality they were almost constantly contracted to work at Jarman. The career consultants were predominately men over 55 years old who had semi-retired. Scan was headhunted from a major competitor and had been a career consultant himself for a number of years, so was an ideal candidate for the job. There is a typical pattern of management style at Jarman: first is the ‘honeymoon period’, which does not last long, and second is the ‘fire and brimstone period’, during which the individual is attacked at every turn. If you survive this period, your future at Jarman is determined by your performance throughout this ‘test’ period. Everyone goes through this rite of passage in some way or other and those that do not survive or perform poorly will rarely gain respect of any level from Rupert. A strong personality was needed for this role, as the previous Managing Consultant was in his post a matter of months. Scan was in conflict with Rupert from the outset of being in the post and never experienced a honeymoon period. The relationship between Scan and Rupert was one of respect but also one of conflict because Scan fought back. Rupert appeared to enjoy the sparring but Scan was ‘permanently on high alert’ and suffered from stress-related symptoms. Bringing business models from his last employer, Sean suggested a radical strategy that all Career Consultants should be formally employed by Jarman rather than the ad hoc relationship that was currently in place.
Nadia was a 25-30 year old Client Services Manager, who was disliked by many because of her lack of interpersonal skills. An example of this was when shown a photograph of a colleague’s newly-born premature nephew, she said, “oh my god, it’s ugly - take it away, it will put me off my dinner.’ On another occasion she remarked, “okay, I think we have heard enough about you and those boring kids. Can we get on with some work now!” Whatever people thought of her – whether a “cold calculating bitch” or a “straight talking professional” - she got the job done. ‘Not here for a popularity contest’, she would say, but she certainly had the right attitude for her sales role. Nadia was always first to arrive and last to leave, and her bright yellow sports car was always parked outside her office window, almost on display to the rest of the telesales team. Each of the Business Development Managers who conducted face-to-face meetings with the clients had a dedicated telesales person. That person’s role was to contact existing clients regularly, contact cold or potentially new clients and manage the Managers’ diaries. Each appointment had to be confirmed, and location directions, company details and a historical overview of Jarman’s relationship had to be provided for the Business Development Managers. The Telesales staff for all the regional offices were based at the Head Office and Nadia managed that team. Running a clear desk policy (strictly clutter-free) with staff having to ask for tea and comfort breaks, Nadia was a strict manager. However she negotiated strongly for her team members and gained an overall respect from her colleagues on a professional level. Strategically managing her own position within Jarman, she manoeuvred herself into a project management role, managing all new projects, including the second IS investment. Nadia was extremely competent and hard working. Beneath her work façade, Nadia was incredible fragile, drawing on an inner strength for her performance at work and she suffered terribly from stress-related illnesses.

Amy was a capable 60 year old Client Secretary who worked incredibly hard. A matriarch to new clients, to some consultants and younger staff members she was much respected. A conscientious employee, she always got the job done, but often ignored labour saving techniques. Work weary and downtrodden, consequently Amy was irritable
with those that she considered minor players in the hierarchical management structure. Her central location in the open plan office meant that everyone was within range if Amy had a complaint or an objection to something, and she did not keep her opinions to herself. Amy played a major part in covert resistance activities, projecting her resistance upon the technology. She was vocal and Rupert often shouted at me to "just deal with her, oil that squeak!"

**Deirdre**, the Finance Officer, had come to Jarman after leaving secondary school at the age of sixteen. This was often referred to as a success story as Deirdre had been encouraged to train and gain accountancy qualifications. In a pivotal position, she was Rupert's 'fountain of knowledge' and he trusted her implicitly. Her primary role was in accounts but she was also Rupert's secretary until her own job and Rupert's needs grew with the business and a PA was employed. Knowing every aspect of the business, her judgement was called upon in diverse ways. Her proximity to Rupert provoked different reactions by new staff members to Deirdre, as at first they did not trust her, but she was a true professional and soon gained their respect. She was neither a gossip nor a telltale. Her position at Rupert's side was soon pitied as she was often on the wrong end of his frustrations. The reality was that Deirdre put on a façade as she walked into Jarman - she wanted to look for a new job but felt loyal to Rupert, who had funded her training. Rupert had once confided in me that he was disappointed with the lack of Deirdre's aspirations: "I brought her to London once for a sales meeting, the first time she had been to London and she wanted to go home. A local girl with local values and happy to stay local. I expected more."

**Bill**, the lead academic on the TCS project, came to Jarman about once a week, meeting Rupert to discuss the ongoing project, myself, in my role as the TCS associate, and other Jarman staff members, either in an advisory role or in his role as a researcher. The staff
accepted Bill because of his friendly manner, his frequent visits and because he also made them cups of coffee. This was a mutual relationship between Bill and the management at Jarman as the concept of the scheme was to share. Rather, that was the concept for some. Bill and the other academics attached to the project shared their knowledge, had access to the company, and mentored me, as associate. Rupert, however, struggled with the relationship; he constantly wanted to have strategic consultation 'on tap' and if Bill came to Jarman, Rupert was always perplexed if he went without meeting him, exclaiming, for example, 'What? He's gone? But I've not spoken to him!'. What confused Rupert most was that although he began to rely heavily on Bill's professional advice he struggled to accept it. He wanted to control Bill as he did with all at Jarman, but he couldn't. Rupert had been educated at one of the top British public schools but never made it to University. Strangely, no member of staff employed at the Head Office was university educated until the project started, though this was not a deliberate act, as Rupert often commented on the fact and a graduate trainee was soon employed. Rupert was in awe of Bill, the 'young doctor', but he constantly struggled with what another academic on the project referred to as 'a fat chip on his shoulder', his lack of educational achievement. Rupert thought very highly of himself - this was a man who held fortnightly 'Great Thoughts' meetings with his non-executive directors, but whose 'great thoughts' were they?

5.2.4 The different products/services available

Jarman provided a range of high quality career consultancy services, covering executive placements, the Management Programme, which was the core business area, group career guidance, mentoring and team-working, career management and development.

Senior Management Programme: Jarman described this service to its potential new sponsors and clients in the following way: 'Working with a carefully chosen consultant, spending as much time as needed to help them cope with the emotional roller coaster that invariably accompanies job search. Skilled careers advice, supported by psychometrics where appropriate, to identify and set new directions, whether climbing the promotional
ladder or having a total career change. There was the provision of specialist coaching on interviewing and networking techniques. Continuing help from the consultant to evaluate offers as they are received, including assistance in negotiating or finalising the terms.’ This core service of a bespoke one-to-one career guidance programme was packaged in a number of ways. The Management Programme was a six-month programme, while the Director Programme was unlimited in length and there was an instance when a director returned as the first job found was not suitable. These anomalies were never wasted and were always used as marketing devices to potential sponsors. There was also a 3-month Senior Middle Management Programme.

Swift Start + was designed for the middle management bracket. An individual would be promised a number of short one-to-one sessions with a career consultant, and a research service, including company or industry intelligence, or a list of companies in a specific area and or sector. These were additional to the self-help Swift Start CD that would guide the client through the complex procedure. Templates of letters and CVs were provided on the CD, together with links to web sites and general advice and tips for the journey back to work. Swift Start was the provision of just the CD with an open Career Consultants surgery on site.

Performance and mentoring services were designed for those underperforming. Not many clients used this service and its presence was to ensure that there was a full range of products available, catering for every eventuality of career progression. Jarman employed speech coaches to train clients for their interviews, and mock interviews were videoed and than analysed. All staff members went through the training and staff and employees alike dreaded the consultant’s room. The coach was a former BBC presenter who could on occasion be heard to boom such uncompromising advice as, “Stand up, man! Shoulders back, and please, nobody and I mean nobody gets away with wearing beige crumpled suits!”

10 Pseudonym’s have been given to these services and products
5.2.5 The Business Functions at Jarman

The critical business functions that supported the Managing Consultancy were Sales, Client Services, Finance and Client Services. Overviews of the functions are explained below. Figure 5.5 presents a high-level view of all the functions at Jarman after the first IS investment project, including the supporting systems. This version (Figure 5.5) was conducted in autumn 2001.

5.2.5.1 Sales

The Sales function consisted of three stages of the lifecycle of the customers, who were referred to as Sponsors. Firstly Sponsors were potential customers or opportunities, and were associated with a 'courting' process, usually between HR managers and Jarman's Regional Managers, also known as the Business Development Mangers (BDMs). HR Managers were made aware of their services in case of an economic downturn, for if redundancies became a reality. Relationships were built and maintained. Then the Sponsor became an actual customer, an unusual business situation whereby the Sponsor pays the invoices but their ex-employees receive the actual service. The Sponsor had to be updated regularly on the progress of the client. A swift re-employment would be beneficial, to ensure the customer was retained. Then the Sponsor would become a previous customer, and Jarman would aim to maintain the relationship, keeping it 'warm'. As the company began to deal with countrywide organisations, the Sponsor could be a number of different individuals belonging to the same organisation. There were a number of customer relationships to manage, and the client, once placed in new employment was also a potential contact for new business. The Telemarketing Sales team based at the Head Office in the North each had a number of BDMs to support from the North, South, Midlands, Bristol, Yorkshire, London and Scottish offices. The telemarketing team chased potential targets, making appointments for the BDMs, and it was the task of the BDMs to convert the potential customers into actual sales. Once the BDMs had closed the deal, the final step of the process was to make an introductory appointment for the client and to host the first meeting at Jarman, whatever regional office. They would then trigger the start of the client's journey on the IS system.
5.2.5.2 Client Services

The career guidance service was not a recruitment service, but was facilitated via a range of executive programmes with a foundation on mentoring and networking delivered by a personal executive career consultant. Each Client has individual needs and is treated as such but at some stage requires a sequence of universal activities such as developing a marketing campaign, CVs, letters, research brief, and presentation training. This was referred to as the ‘journey’. This working relationship between consultants and Jarman is very informal, with clients being allocated on an ‘as and when’ basis. It is a mutually dependent relationship where the implicit and explicit connections blur, because once the client procedure starts and the initial basic contact and contract details have been recorded and centrally stored, the continuing client information is stored by and kept externally with the consultant. The career consultant’s role was a ‘hand holding’ one and they would deal with emotions, financial implications and the building of self-esteem and confidence of the newly unemployed clients. The rationale has always been that client information may be of a sensitive nature so should be stored securely but this procedure has been becoming problematic as the company expands and client base grows. Regular updates should be submitted by the consultants, either by e-mail, written, or sometimes verbally, then entered by administrators onto the client system. The process is and always has been problematic. Board meetings require current, accurate client information, which requires frenzied activity to gather disparate information from various sources and locations, and as the client numbers grow so does the problem. This was the core product at Jarman, with all other functions providing the supporting components to establish new clients and help them find new job roles. Jarman’s ultimate business strategy was to reduce the job search time in a professional manner, without the client feeling like they are being pushed. The journey was always metaphorically described as the client ‘taking a taxi rather than catching a bus’. The client was on a bespoke journey, stopping when they needed, and was in charge of his journey, rather than stopping at predefined stops and the process being driven by the bus driver.
Figure 5.5: High-level stages of client journey map
Figure 6 depicts the client journey from development of the actual business through the telesales teams. The individual client is either mentored or receives performance improvement whilst they received bespoke research support. The client eventually gets a job and updates the paying customer, the Sponsor. Parallel activities include the Sponsor being regularly updated. Market intelligence is also fed into the cycle and this increases the chance of new business, obtaining new sponsors. The job search time cannot really be scientifically calculated but previous experience indicates that those clients who have CVs and targeted mailing finalised sooner rather than later complete the client journey faster.

5.2.5.3 Research

The Research Team provided a bespoke service for each client, researching industry and specific company intelligence, generating targeted mailing lists of profile organisations and generating statistics pertinent to the client’s current status. The team had two distinct areas: the Primary Research Team, who established the Client’s research portfolio; and the Secondary Research Team, who produced the mail shots, CVs, industry/company reports and associated documentation. A differentiating factor and unique selling point of Jarman regarded a targeted mail shot, the claim that each company was contacted directly to update current contact details, ‘getting the right letter on the right desk, at the right time’. No letter or CV was ever sent out without the contact details having been updated within the previous six weeks. Each letter was marked ‘private and confidential’ and was usually addressed to the Managing Director of the organisation and was always on high quality stationery. I was always astonished when clients gained employment in this manner but they did, and regularly.

5.2.5.4 Legacy System - FileMaker Pro

The legacy system was predominately a FileMaker Pro database that was adopted when the company was established. Rupert and Sarah had a publishing background so it was a
natural progression to employ familiar business tools. The selection of this product at that time was a logical one because File Maker Pro was easy to implement with simple set-up capabilities. There was instant database functionality with an intuitive interface and a major selling point is the ease of customising different views of the same data from the same storage repository. FileMaker Pro enables basic customisation and design for novice users without programming skills and it is this feature that over a decade later was a causal factor of the unstructured, mismanaged infrastructure that had evolved at Jarman. There was seven isolated databases or views of the database that did not interact except at the lowest level. Staff members added fields on a whim and imported data at will. There were minimum data disciplines in place and this contributed to a relaxed attitude to what was the company’s most valuable asset, information. Jarman had only recently recruited a specific IT staff member; previous to this no one had sole responsibility of the database. Sarah (the co-founder) was often asked to create a new view or add random fields but it was obvious that she was relying upon existing knowledge of older versions of the product and had not ‘got to speed’ with any of the new functionalities. An additional observation was the emotional attachment to the legacy system with a genuine concern of some long-term staff members over any thoughts of replacing FileMaker Pro. The MD was more emotionally attached than others – “it is my history so be careful with it” he once said soberly. Before any decisions were made to replace or overhaul File Maker Pro, an exploration exercise was conducted to ensure that FileMaker Pro could not be professionally programmed for the company’s needs. Independent specialists were called upon to categorically state that FileMaker Pro would not be able to support the forecasted rate of growth at Jarman.
Figure 5.6: High level business processes at Jarman
5.3 IS investment Phase 1: the migration project

Throughout the summer of 2000 senior management at Jarman reached the decision that the present Apple Mac infrastructure was not the most flexible or rigorous environment to build any future IT/IS strategies upon. The current Apple Mac system was only two years old but has become limiting for any further expansion. There was little technical support other than a local small company who maintained a number of schools in the area. A core business component is the exchange of information between Jarman, their clients and ultimately the paying customer, the sponsors. It was becoming more frustrating to conduct day-to-day actual business activities and it is with these factors in place that the migration of an Apple Mac System to a PC environment became a necessity. Jarman operates in a dynamic business environment, which was evolving due to IT use. At that time competitors were already moving towards using Internet technologies to improve business performance. Jarman had to emulate their competitors and develop radical business and IS/IT strategies to achieve competitive advantage. The strategies also needed to facilitate an increased geographic coverage of the company’s service to satisfy customer requirements of corporate customers (sponsors) with widespread sites.

The company operated three independent systems that supported their financial, client services and administrative activities. However, the systems were established in an ad hoc manner and provided minimum business intelligence, which was crucial to the company’s strategic decision process and future operations. The company needed information technology to provide the service expected by their sponsor companies, clients and consultants. The growing list of sponsor companies were blue chip and expected Jarman to have efficient and effective integrated transaction processing and administrative capabilities such as electronic sales order and invoice processing and email. Their clients required electronic access to details of employment opportunities and the information that could help them improve their employment prospects or performance. Electronic communication with their consultants, other clients and potential employers were also crucial requirements at that time. The career consultants needed improved access to accurate, timely and relevant information about the sponsors and...
clients. This would enable consultants to learn from best practice, provide a more individualised service to both sponsors and individual clients and help secure future business on this basis. However, the company had no in-house IS/IT expertise and has historically relied on external consultants. An integrated enterprise information system was vital to Jarman’s ambitious expansion plan for offices in Birmingham, Yorkshire, Bristol and London. The system was needed to facilitate increased operational efficiency and effectiveness, which would then enable the company to focus on increasing market penetration through improved management of customer relationships and the development of innovative product/service offerings. The system would also enhance Jarman’s competitiveness through the depth and quality of its career guidance service and bespoke client service. It was needed to increase the efficiency of the company and to impact upon company structure, through its potential to support further virtual office communities, whereby groupings of consultants and clients interact via the internet and use ad hoc rented space, such as conference centres, for personal contact as necessary.

5.3.1 Drivers for Change: Phase 1

On Monday 22nd January 2001, the Board requested a full review of the Apple Mac issues that were affecting the efficacy of staff performance. A review of the present system was conducted to realise what ‘real’ benefits and ‘quick wins’ could be gained with the migration of the current Apple Mac environment to a PC infrastructure. The core components within the review were based upon actual problems and issues raised by the staff when gathering requirements at the start of this project. The problems have been divided by team groups, but all staff experience similar general inconveniences, of data crossing the different platforms and then having to amend any changes. All staff members were asked to estimate what length of time was spent each day addressing problems that occur because of the Macs. As expected, because of the different job roles there were obvious differences in times. For example, some staff dealt totally with manual diary management or creating a client’s documentation from e-mails and floppy disks, so their problems were labour intensive. The Research Team deals mainly with databases so no real major wins will be experienced until a relational database is
reviewed. To gain a holistic understanding, an overall working week of all staff members at the North West office was established to be 424 hours, and approximately 37.5 hours was spent by staff amending problems that occurred because of the Mac environment, which equated to 8.84% of the working week. There was much discussion regarding ‘quick wins’ gained from the migration project, reassuring the workforce that the management were listening and responding to their needs. The reality was that the migration was critical and made good business sense.

Each staff member contributed to the review of the current system. One of the greatest problems was documents coming on to the system being formatted on a PC and then requiring reformatting for a Mac. Once the documents were passed back to a PC platform the formatting would be lost again. This caused huge problems about how Jarman was perceived on a professional level when dealing more and more with blue chip organisations whose expectations were not being met. A further frustration on a productive level was the ‘sluggish’ performance of the Mac. Many new applications required for this growing business were not Mac compliant, so Virtual PC software had to sit on the Mac and then Sage for instance or other job-sourcing software was then opened with Virtual PC. This was an incredibly slow process. These difficulties were a real issue for Jarman staff at that time (late 2000).

**General Administration Business Function**

- The business process of obtaining and printing Client’s CV and letters is a constant battle. Documents are either e-mailed or saved on a floppy disk. Both methods present problems that would be solved with a PC environment, simple guidelines in saving documents and minimum staff training.

- Documents become fragile/flawed when being saved in a word format on a PC and then opened on a Mac. Documents often lose saved settings and have to be amended, clients have to be contacted and Jarman IT systems are looked upon as problematic.
✓ E-mail documents again suffer this problem.

✓ Documents that have crossed platforms also suffer printing problems that simply cannot be explained, but there have been regular occurrences of documents viewed correctly on screen but printing in a different state.

✓ Clients regularly cannot open e-mail attachments from the Macs to the PCs.

✓ Documents saved onto a floppy disk from a Mac sometimes cannot be opened simply on a PC.

✓ Letters saved in different fonts and font sizes do not always travel across the different platforms. Ariel and Times New Roman style fonts suffer greatly and also intermittently so all documents have to be monitored. Letters and CVs can be printed off looking correct upon screen and once printed are full of errors.

✓ No screensaver on Macs, so confidential information on view when away from desk

✓ Cross platform glitches are addressed.

✓ E-mails systems will talk to each other.

✓ Printing problems will be addressed. (Printer problems are always an issue)

✓ Staff morale improved - frustration of constant amending unnecessary problems

✓ Real saving on paper (CVs, letters are often printed in volume – over fifty, 2 page CVs is not uncommon) and staff time

✓ Efficient image is presented, the Mac system often get the blame for any technical problem that is often a user problem.

Table 5.2: General administration business functions
<table>
<thead>
<tr>
<th>Research Business Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Virtual PC (needed for BT Phone Disk) slows other applications down</td>
</tr>
<tr>
<td>✓ The migration involves a detailed investigation of current flat-file database</td>
</tr>
<tr>
<td>✓ Presently the team exists without enough computers per staff members so there is constant desk planning</td>
</tr>
<tr>
<td>✓ Difficult to extract information from Filemaker due to limitations in data definition</td>
</tr>
<tr>
<td>✓ Relational database is necessary so data can be pooled and information collected. Database administration will be reduced.</td>
</tr>
<tr>
<td>✓ Different procedures will need to be adopted, mail merges into word (satellite offices will be able to produce their own documentation)</td>
</tr>
<tr>
<td>✓ Documents created in Word, cut &amp; paste from Word to Filemaker is difficult – may have to repeat several times for a letter.</td>
</tr>
<tr>
<td>✓ Copy and pasting of multiple records into different databases is time consuming and open to errors.</td>
</tr>
<tr>
<td>✓ Some Research tools can only be used on PC: Birchin Lane – Job-line database InfoPower, TNT Travel Manager</td>
</tr>
<tr>
<td>✓ Clients and staff members need to use these applications so there is sometimes a conflict of times.</td>
</tr>
<tr>
<td>✓ Sage sits upon the hard-drive, relying on manual backup. Not Best Practice and contributes to making all activities slow paced</td>
</tr>
</tbody>
</table>

Table 5.3: Research business function
Sales Business Function

A labour intensive activity is the management of the manual diaries, as there are nine in total that often have to be married up. Double bookings suggests a lack of professionalism to Sponsors and potential Sponsors.

An electronic diary will be able to:

- Organise rooms, equipment, consultants and sales people.
- View all candidates at once.
- Staff informed of new or changed appointments, diary changes would be flagged.

Consider Palm pilot for RW.

- Viewed remotely by sales team

There is a constant problem with the connection link to the southern office. Communication between sites is fragmented, due to infrastructure and procedural issues as well as cultural differences. Midlands and other offices need to have smooth connection. The introduction of WAN should improve this issue.

Need ability to issue standard letters, faxes and emails to corporate clients from within the system, which will be addressed with a new PC environment.

Southern office have problems connecting to HQ server, necessitating Word documents to be stored on local PC whilst modifying and saved back on server when complete. Potentially a big problem as local hard drives are not backed up, not regarded as good practice.

Able to fax directly from and to PC.

All staff will a have e-mail accounts, this will enable fluid communication.

Cumbersome practice of paper memos will be eliminated.
Clients are requesting to do more electronically and reduce travel to the office, which may become a reality when all stakeholders at Jarman are communicating via a common platform.

Table 5.4: Sales business function

**Accounts Business Function**

- The Sage package sits upon a Virtual PC application on top of the Mac Operating System, which creates various problems.

- Closing down of applications when information is needed from different applications is timely and tiresome.

- System is very sluggish.

- E-mails are often in wrong file format to open.

- Diary Management is necessary and has to be conducted manually, often from remote locations eg BDM homes.

Table 5.5: Accounts business function

Below are some voiced expectations or ‘wish list items’ that staff identified as future functionalities during the review. These have been included to highlight the level of technological sophistication that some staff perceived as essential, and they are also embedded functionality that the later CRM systems would bring.

**Wish list**

- New e-business transaction capabilities. Majority of applications are PC based.

- Financial Application needs to be replaced with an improved version of Sage (Line 100) or a new package (Pegasus).
Client Tracking System is under discussion.

Databases will be investigated in more depth with the continuous use of File Maker v5 or another database application.

A WAN workspace with shared access.

Technology may bring a CRM, sophisticated research method.

Would like to update corporate database from electronic diary.

Work Flow in new system.

Opportunity to make available client details directly to HR Managers to assist with their recruitment process, interactive web site. A WAN allows Jarman to their host web site.

Technology should remove distant communication problems and have all offices working in a uniform manner.

Improve remote meeting mechanisms (Teleconferencing, Video Conferencing, Virtual Meeting, etc).

Would like to implement auto telephone dialling from the database.

Table 5.6: Wish List

5.3.2 The New PC Infrastructure

In January 2001, the Head Office expanded into adjacent premises. The Midlands office opened on January 1st 2001 and there was also an extension to the headquarters based at the MD's home. The current infrastructure at that time consisted of an Apple server supporting 12 Apple computers at the Head Office and 3 PCs at the Southern office connected via an ISDN link. The 4 laptops were not connected to the network and there were two standalone PCs that were used by clients. Internet access and a small number of email accounts were accessed on two Macs via a dial-up modem at head office. The main
business systems were based on MS Office 98, File Maker Pro 4.1 and Sage 4.1. There were also some PC based software products run on the Apple Macs using Virtual PC software, which were predominantly used for research and accounts. There was no formal virus protection in place, just random versions of software on various machines.

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<th>North</th>
<th>South</th>
<th>Midlands</th>
<th>MD's home</th>
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Table 5.7: Mac Infrastructure at Jarman

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<th>MD's home</th>
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Table 5.8: PC Infrastructure at Jarman

The Migration project involved upgrading the IT Infrastructure, migrating the existing systems and data, and providing ongoing support of their hardware and systems. The new
infrastructure had to be capable of supporting the existing systems based on File Maker Pro, although Jarman was outgrowing this system. The whole building required re-cabling with forty plus data points and the hardware listed in Table 5.8. This list of hardware increased as the requirements were being gathered. Other components of the migration project were IT Infrastructure services based on Microsoft NT, a File and Print Server, and a move to Outlook Exchange with Web mail for remote users. Diary management, the ability to access electronic diary systems, had a huge impact at Jarman. The Telemarketing team used ten manual A3 diaries to manage the appointments for the sales people. These were loose-leaf diaries that had to be populated in pencil to avoid mistakes. At the end of the day the diaries were then photocopied and reduced to A4 and they were then faxed to the different offices. Trying to co-ordinate meetings between a number of sales people was difficult. The manual diaries were also permanently in use and required a large table for their storage, which was a problem in an already overpopulated office. The infrastructure would also provide a dedicated database server, a corporate level virus protection and secure remote access to the network via Virtual Private Networking (VPN) for remote workers and satellite offices.

The migration project had to be synchronised rigorously. There was, and had to be, communication and feedback sessions with all the staff, and special emphasis was placed upon ensuring that workers from other offices and mobile workers felt included. There was a training room set up at each office location with the new PC. The training rooms had a dual purpose because the migrated data had to also be meticulously tested. Staff, once trained, tested the data exchange to ensure it had not been corrupted by the migration.

The following implementation plan (Figure 5.7) is from the Migration project, with names changed. All staff had been offered training in navigating the PC environment, file storage, alternative shortcuts and on differences between using a PC and a Mac.
TRAINING IMPLEMENTATION PLAN

SERVICE AND EQUIPMENT SPEC.

Order Placed 26/03/01

HARDWARE & SOFTWARE INSTALLATION

Install 17/04/01 – 25/04/01
Windows NT
MS Exchange
File Maker Software
MS Office

USER & SYSTEM ADMIN TRAINING

NT Administration 12/03/01 – 15/03/01
Microsoft Word (North 10 staff) 26/04/01
Microsoft Word (North 10 staff) 27/04/01
Microsoft Word (South 7 staff)
Microsoft Outlook (North 10 staff) 03/05/01
Microsoft Outlook (North 10 staff) 04/05/01
Microsoft Outlook (South 7 Staff)
PowerPoint (North)
PowerPoint (South)

TEST DATA MIGRATION

Move Mac Data files 25/04/01 – 08/05/01
Move File Maker Pro Database

USER TESTING & DATA VALIDATION 8/05/01 – 28/05/01

Create Test Scripts
Test data rigorously

INTERNET & LIVE WITH NEW ISP DOMAIN 28/05/01

LIVE CUT-OFF AND RE-DIRECT OLD MAIL 29/05/01

Re-direct Mail
Copy Live Data

IT Provider PROVIDES SUPPORT Ongoing

Figure 5.7: Migration Implementation Diary
5.3.3 Resistance: The ‘Mac’ Factor

Mac infrastructure was not able to support Jarman at any level, but there was still an emotional attachment. Not missing an opportunity, Rupert gave staff the opportunity to buy their machines, which they did in earnest. The move to a PC platform ‘was a no-brainer’; Rupert loved to use this colloquial phase, first used by a representative from an IT company. The migration would radically alter working conditions for everyone at Jarman. The Head Office was actually doubling in size, new staff were being recruited, and the Midlands office had become a reality, together with another Jarman office in Scotland. There was a real sense of optimism and expectancy regarding the Migration Project from the entire workforce because they knew that existing conditions could not continue. However, it was at this point that ‘whispers’ and ‘murmurs’ could be heard regarding the migration. There was a real fear of what changes may affect the status quo, especially by all the long-term staff who had known only the standard way of working for almost a decade. Comments encountered included: “I am scared. I don’t mind admitting it. How is all this information going to get into my little brain?” and “I want it but I don’t want it, do you understand what I mean?” I sat with one of the researchers who had been with Jarman for nine years while she actually cried, as she was afraid she would be unable to do her job once the PCs arrived. Morale should have been, and was, at an all time high but beneath the surface there was a sense of dread for some. This dread became sheer panic and transformed into a loathing for the PCs when they did not perform as they should, or were expected to.

Training rooms were set up on-site at each office so that all organisational actors, from the MD through to the office junior, could be trained. Rupert demanded that in respect to training, he and his wife should be “treated as one of the crowd”. Rupert saw this as the whole team together, as a bonding process, but those training with him saw it as unfair, expressing that it was “not fair - why do we have to go in his session?” The extensive training provided during the migration project wasn’t sufficient time for all the staff to become accustomed to the new centralised, common IT and organisational systems. This was because they were being implemented at a time of rapid expansion – as one member of staff said, “we had to hit the ground sprinting.” The staff needed the training and it
was deemed necessary to get over the ‘Mac’ factor. This was a phrase used to describe this period of change in company-wide communication literature or in presentations, so there was the assumption that there would be a level of disruption. A further assumption was that any resistance would be observable with associated behaviour. The management team expected some level of overt resistance but passive covert resistance was not even contemplated. Projection resistance could soon be witnessed at Jarman in the aftermath, once the euphoria of the migration expired ...‘these machines are rubbish compared to the Macs’ ‘what’s it doing now’, ‘Oh no not again if Rupert finds out that it has messed another print job (print job = 100+ mail merged letters) up he will go mad’. For a period of time, some of the research team members and some client services team members were very vocal in projecting their fears and anxieties onto the new technology. The two teams worked on one side of the building and the other side housed the telemarketing team and the boardroom, where Rupert the MD worked when in the office. The telemarketing team moved from the manual diaries to the electronic diaries. This move reduced a huge labour intensive activity of managing the electronic diaries, increased efficiency of the team and moved some of the responsibility of diary management on to the Business Development Managers. The telemarketing team embraced the changes and could not sing it praises more highly, they were also not as attached to the Macs being a relativity new team. The situation was that when Rupert was on the Client facing side of the organisation that housed the client services team and research team there was a constant criticism of the new (very expensive) technology and infrastructure. On the other side of the building, where he spent more time working, was the telemarketing team whose working environment had improved greatly because of the new infrastructure. Rupert did not appreciate ‘this constant moaning’, ‘for god sake I can’t bare it’, he was not a tolerant man.

5.3.4 Metaphors: Tigger bounces into Jarman

Tigger and Eeyore emerged at Jarman around this time. The precise date was not established but there was soon a noticeable overuse of the use of the terms ‘Tigger’ and
‘Eeyore’. The terms ‘Tigger’ and ‘Eeyore’ were labels that Rupert attached to the two different teams, or physical sides of the organisation. A creation of a control technique, involving the introduction of the metaphors of ‘Tigger’ and ‘Eeyore’ borrowed from AA Milne’s characters of *Winnie the Pooh*. ‘Tigger’ represented enthusiasm and a ‘can do’ attitude and Eeyore represented resistance and reluctance. The observable categories could be loosely described as the Telemarketing Teams being the Tiggers, the Research and Client Services teams the Eeyores. The concept was adopted almost immediately. Metaphoric language was identified throughout the study as being widely used and accepted by all at Jarman prior to the explicit use of the Tigger and Eeyore metaphors. It may have been the habitual metaphor use in this organisational setting that enabled an almost submissive acceptance of these two metaphors.

There had always been a constant assessment of how those at Jarman related to external people and it is interesting to see the Tiggerisation of aspects of this process. Managers constantly reminded staff that any telephone call could be the first point of contact with a potential client. To reinforce this, there was always the possibility that when staff answered the telephone, it could be one of the senior managers, typically the Managing Director. Regular telephone calls were made via the switchboard, bypassing the direct dial telephone route, so-called ‘check calls’. Check calls were made at random times throughout the day, but often at lunch times and just as the office was closing. This was done to ensure that all phone calls were answered within a certain timeframe (three rings) and that the proper ‘script’ was used - “good morning, Jarman, this is Amy speaking, how may I help you?” Most importantly, this had to be said with energy and dynamism. If any components were missing, staff were asked “are you having a bad day?” and, with the emergence of Tigger, were requested to leave the answering of the telephone to the Tiggers of the company. Once over those hurdles, the question, “how are you today?” was normally shouted down the phone by the manager and the expected response was “fantastic!” or “great!”, again said with much enthusiasm. This then had to be followed by the return question, “and how are you?”, with the response back, “great!” or “fantastic!”, “can you put me through to Sales?” One lunchtime, a few of the staff were

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11 Tiggerisation is defined for this purpose as displaying a ‘can do attitude’ a optimistic and buoyant persona.
talking and one of them said, “I wonder what might happen if you responded, ‘actually I feel a little unwell today’”. Another replied, “then you’d be an Eeyore!” to much mirth. Another staff member said, “well, Rupert doesn’t actually listen to what you say, just the tone, so you could say pretty much what you wanted as long as you sounded willing.”

Tigger became more heavily relied upon to constrain behaviour, not perhaps with an iron grip, more an orange and black stripy fur grip. The strength of the metaphor was powerful, as to be viewed a Tigger rather than an Eeyore was preferable. Gradually, and as the period after migration project progressed, the different teams in the organisation were referred to as being Tiggers if enthusiastic or were perceived to be Eeyores if any negativity (even if valid) was displayed. The reiteration of the two metaphors became a constantly presence. A good illustration of this control came at a time of discussion regarding the purchase of a multi-functional networked printer with photocopying, stapling and sorting capabilities. This would be a huge investment for Jarman, introducing unquestionable benefits for all the teams, the Telemarketing, Research and the Client services teams. The meetings to discuss and decide involved managers from all teams, Rupert and myself. There was some conflict regarding the location of the networked printer and who about who could justify the greatest need. In one meeting Rupert asked for all Eeyores to leave the room, while in another, as we all walked about the company to identify an ideal location, he suggested (with a smile) that ‘come on you Eeyores, trot quickly behind him’. He was referring to the Research team because there was some confusion, with Rupert understanding that they did not want a networked printer. Both teams wanted the printer, the research team argued that they printed out target mail-shots and CVs so it would be more beneficial to locate the machine near them. The Telesales team produced corporate literature so wanted the machine near them. The confusion was that the Telemarketing team really did not need a printer but a photocopier. A further use of the metaphor to emphasise to the teams there was to be no more dissatisfaction was on a referral visit for a demonstration off-site at the resellers. Rupert asked, “Will I need my Horsebox if I am going to be transporting Eeyores around, or will the Jag do?? Get them to make a decision.” The printer was located on the Telemarketing side of the organisation but a smaller version arrived with the other team soon after.
5.3.5 Tiggerisation at Jarman

Slowly the physical presence of Tigger started appearing throughout the offices, sitting upon computer screens and on mouse mats. There were Tigger pens, Tigger mobile phone covers, Tigger birthday cards and in one worker's car, a Tigger suctioned himself against the window. The ultimate display of Tiggerism was by a Sarah Jarman's co-founder at a Christmas office party. She had managed to find Tigger's head formed as large dangling earrings with a flashing red light nose. They swung and flashed all day, achieving the required response. Another example of how Tigger had become an embedded symbol occurred when a present was bought for Sarah on the birth of her baby. Money had been collected from all the staff and in the traditional manner an e-mail went around and everyone gathered at a convenient time for Rupert to present the gift. A Winnie the Pooh-themed jungle gym and cot mobile had been bought, together with Tiggerised baby-grows. This was now a regular theme for any celebratory gift. On presenting the gift which was being opened, Rupert informs everyone “though don’t worry, Sarah, we have taken the offending Eeyores off the contraptions. We want the boy to be a Tigger... don’t we!”. Everyone laughed, and I ran to my note pad.

The Managing Director then came up with the idea of a Tigger screensaver. An animated bouncing image was therefore created and made ready for installation on all company PCs and Laptops. The idea was that Tigger bouncing across the screen would be an instant visual reminder of the ideal ‘can-do’ dynamic attitude that the workforce should exhibit at all times (see Figure 5.8). However, this idea was shelved once a bank of computers was Tiggerised and a mass of jumping Tiggers appeared, not really achieving the desired effect. It looked chaotic and lacking direction, opposite to the characteristics that Rupert had wanted to introduce with this metaphor.

The workforce was aware and constantly reminded that to be labelled an Eeyore was negative, and it was also difficult to shake off this impression. Tigger and Eeyore became part of the vocabulary. One day there were a number of women in the female toilets and they were deciding on a lunch trip. One person could not be bothered going, as it had started to rain, but she was told, “oh, don’t be such an Eeyore, and get your coat!”
Another occasion one of the same group was crying at her desk because of a work matter. 'I don’t want to be an Eeyore but I can’t help it’ was her response to me regarding not being able to stop crying.

There are only TIGGERS at Jarman not EEYORES

Figure 5.8: Screen Saver at Jarman (company name changed)

5.3.6 Resistance 2: The ‘VPN lines’

The Business Development Managers were all issued with a laptop with Virtual Private Network (VPN) access to their e-mail, diaries and Jarman documents. The seven members of the Sales team were mixed in their IT abilities, but they said that they were
looking forward to having what they saw as empowering technology, perhaps influenced by the now inherent, silent power of the Tigger and Eeyore metaphor that heightened individuals' fears regarding change or overtly demonstrating resistance. All the team attended training sessions for Microsoft Outlook and everyone was issued with training manuals. Further training was also given to the staff to help them to access the network remotely via the VPN. The procedure was to log on to the Internet, then bring up the VPN tunnels, log into the local area network (LAN), open Outlook and collect that day's messages. The user could also access the main server and save and retrieve documents. However, all online activity at that time was via a 56k modem. Time was required to start the process, and once the messages had been accessed the application had to be synchronised each time to achieve storage of all information on the laptop and reduce synchronisation to 'bite size' pieces. Resistance to these changes was immediate. Despite the sales team's initial enthusiasm, it was clear that the VPN infrastructure had pushed them outside of their technology comfort zone. This resistance manifested itself as a flurry of complaints about the system, diverting attention from themselves (Dickson and Simmons 1970). For example, comments including, "this system was supposed to save time, not complicate matters" (Peter), "you just can't trust the technology, this needs sorting and it needs sorting now" (Kevin), and "I knew this would happen, bring back the Macs!" (Sarah) were recorded and are typical of those remarks made around the time in meetings and in the offices.

This smokescreen focused the attention of senior management upon the IT system, rather than individual user problems with technology, and there were problems in this respect. For example, two users from the Sales Team did not access the system remotely for two months. They came in the office early everyday to collect their e-mail in fear that their lack of IT ability would become public and they would be publicly Eeyored. One user even requested that the more junior staff print the e-mails and then fax them to their homes. As the sales team were viewed very much as 'management', the senior management of the company listened to their shouts (which they did very loudly), reasoning that the sales team were Tiggers and should be treated as such. This led to an 'emergency' investigation into the problems of the VPN infrastructure. The problem was very clear: the users were not comfortable using the system as they did not have the skills
to do so. Not only were they fearful of the technology but also of being labelled an Eeyore by Rupert and colleagues alike, as this was a competitive environment. Furthermore, the problem was compounded, as they were extremely reluctant to admit that they were having problems or that they had not used the written guidance they had been given. For example, common problems of access were: repeatedly putting the modem lead into the network port on the laptop, forgetting to log on to the Internet (so they unable to create a VPN session), not shutting their VPN sessions down cleanly, which prevented them logging on the next session.

Unsurprisingly, the problem dissolved as the managers became familiar with their new equipment and their new roles. There was nothing fundamentally wrong with the equipment. The real problem was that the sales team were resisting being labelled ‘Eeyores’, so they had to ‘make up’ a story for their resistance to the technology that appeared rational to Rupert.

5.4 IS Investment Phase 2: Client Tracking Project

The Client Tracking Project at Jarman had always been on the agenda; ghosts of rudimentary attempts to automate some processes were evident on the archived File Maker Pro system. The TSC project also included the implementation of a Customer Relationship Management (CRM) system as a component of the project. Once the migration project was completed this was the critical business issue that would be addressed. The overall objective of Jarman was to ‘reduce job search times’ to ensure that clients moved through the system in a swift manner without feeling as if they had been rushed. Other definitions were to take a broad view: ‘the client tracking is a strategy that will enable the monitoring of the journey of a Client as they travel through Jarman. Data that is collected can then be used in an intelligent manner for business decisions and business procedures at all level.’ Another view was that ‘the client tracking system is a Relationship Management application. The journey should be viewed from how the client was introduced to Jarman - how Sponsors are found and how Cold calls convert to Warm calls and then to actual Clients - the monitoring of the second journey takes place. All this data is collected and then recycled.’ The latter is from a sales perspective. The Career
Consultants had different opinions, as indicated by notes taken from an early meeting regarding the tracking of the clients: 'There were many issues raised (Issues Raised in Friday 5th January 2001) in the morning meeting and the afternoon meeting with John London (name changed). There was an interesting slant on the meeting with JL as he spoke from the Consultants view, a totally different view from the staff involved in the procedures at Jarman. The Consultants are a powerful entity even though the staff produce and monitor activities it is the consultants that hold the power and contribute triggers for a lot of key activities. The consultants seem a little reluctant to change and there is a fear that without their input or willingness to change the whole project could fail (see Resistance 3). The system that was discussed should possibly be a workflow model that will trigger events and prompt the next activity.' There were a number of different stakeholders, and each stakeholder had a different set of needs and high expectations to manage. Actual recorded identified changes ranged from:

- A customer focus as well as a product one
- Changes to existing business processes, systems and culture
- A bringing together of the front-end of Sales functions, marketing, as well as back-office operations and new product development (Quick Start, Web-site)
- Harnesses all channels of information, Internet, Sales Knowledge, Research intelligence, financial information, Client data and the *plain old grapevine*.
- Improved response times of customer requests
- Improved customers products meet customer expectations
- Internal political and culture changes and issues have to be monitored. All stakeholders have to be informed and updated regularly; a sense of ownership must be created from the on start.
5.4.1 Drivers for Change: Phase 2

The board members were under intense pressure from a number of different forces: firstly, their customer base was increasing rapidly and they had begun to collect a list of prestigious clients—"we are moving into the household name league" is how this was viewed. The new clients came with high expectations of efficiency, and of informative and immediate responses to their requests. The legacy system, though able to support a smaller, more intimate customer base, simply could not produce professional reporting. Any requested client information had to be gathered via e-mail, telephone calls, and a number of different databases (as client information was often not regularly updated) before being formatted into a report. The second pressure was an internal one, as the client base was increasing there was an internal need from senior management down to the receptionist for current informative knowledge regarding their current, potential and previous clients. This was further impacted upon as the careers consultancy was rapidly expanding due to the widening geographical UK spread and there was a heightened feeling that the company’s infrastructure was ‘about to implode’ with the constant demands being placed upon it. A third additional pressure came from the new consultants and administration staff members that were being recruited. They were shocked when they realised the lack of ICT sophistication. A typical comment reflected this: “he (the MD) is a great salesman, as the reality of the IT system is a million miles away from what was described at the interview. I am now dreading getting my company car!” Not only did the company have a legacy IS but they also had a legacy of a long-serving workforce that evolved at a constant pace, and only just coped with what they knew. New recruits were shocked and placed increased pressure on management for an IT system that they required “to get the job done.” That said, there had already been a continuous dialogue about the use of IT to run the business, since during the previous year there had been an impressive financial IT investment in the migration of an Apple Mac platform to a PC platform (there was no attempt to integrate the isolated databases; at that time the emphasis was very much on replicating old processes on a more robust platform). Access to historical organisational documents revealed that the debate of integrating key business processes (client services) was on the agenda since the onset of the company had so far only ever reached the discussion stage.
5.4.2 Tracking the Client

The following process map was created at the start of the TCS project and the participant observation process. The map was always included in any communication literature regarding client tracking (see Figure 5.9). At that time (early 2001) the map was labelled 'A Linear View: Client Tracking System'. As the Tigger and Eeyore metaphors were gaining more impact within Jarman, the map was relabelled 'Triggers for Tiggers'. Rupert seemed to enjoy using the metaphor and it is my observation that he understood how powerful it was becoming. Going through the company documentation the letter 'r' was purposely omitted from the word 'trigger' in a variety of company documents.
Figure 5.9: TRIGGERS for TIGGERS (Previously labelled 'A Linear View: Client Tracking System')
On the top half of the map is depicted all the chronological activities that occur as the client travels the journey through Jarman. The bottom half depicts the activities that should occur as the client reaches each stage of their journey. This is a model journey as each journey differs slightly because each client has a unique set of needs. Each journey also differs depending upon who at Jarman is in ‘the driving seat’.

The vision of the client journey was to reduce job search times, but ‘without jeopardising our BUSINESS CLASS standards’. Intensive requirement activity was conducted to establish each business function’s needs regarding the client tracking system. A paper trail was conducted and data flow diagrams created of the Client journey at Jarman. There were numerous business process maps plotted and expected outputs gathered from key members of each office. The ‘KEY Key Performance Indicators’ that were highlighted by the newly recruited Finance Director were simple enough: lower costs and more clients through the front doors. General requirements were:

- Streamline client journey – speed up but not rush
- Encourage a uniform standard of data entry, storage and output
- Continue to provide and improve a business class service
- Improve business processes and so gain a competitive advantage
- Identification of problem areas/common delays
- Act as action prompter/trigger – plane on production line
- Sponsors allowed restricted access (in future)
- Easy access for all stakeholders – offices, remote users, consultants
- Specific Requirements
- All client details easily accessible
- Log all client meetings
- Log of all activities
- Successes – utilise information
- Action prompting
- Automated processes
- Management Information/Statistics
There was a supplier selection process conducted, once it was fully established that File Maker Pro would not be able to support the rate of expansion at Jarman over the next 5 year period. A ‘Build or Buy’ evaluation project took place to explore the extension of what File Maker Pro could do. The emotional attachment to the last ebbs of the Mac infrastructure effected a painful release, and an official verdict from industry experts was the only real voice that Rupert and others would accept. This involved travelling around the UK to speak directly to the ‘top’ File Maker Pro developers. There were some advantages of staying with File Maker Pro but the disadvantages were greater. The following perceived advantages and disadvantages have been taken directly from a communication presentation and the emphasis on certain words is Jarman’s:

**Advantages**

- Capable of delivering current basic requirements
- Capable of supporting other business functions
- Jarman staff familiar with package
- More gentle change process
- Could carry out simple developments in-house

**Disadvantages**

- Database not designed for geographical spread
- Built on proprietary database - not industry standard
- Will only accommodate Jarman GROWTH RATE for 3yrs
- Unable to accommodate current GROWTH RATE after 2003/4!!
- File Maker could be developed as a viable solution for 2002/2003
- BUT would need replacing thereafter
The decision was therefore to ‘buy’. A selection process was then conducted to find the right solution for Jarman. Goldmine was selected because it was an off-the-shelf package that could be customisable to meet Jarman’s requirements. The consistent requirements for all business areas was that ‘one pool of information’ was needed and that a ‘sequel server should form a jet-engine to drive Jarman’s knowledge store’, so ‘creating an integrated information system that will drive business performance!!’ These and the following quotes are taken directly from a communication presentation, and the emphasis on certain words is from Jarman:

**Advantages**

- Off-the-shelf package
- Based on an industry standard database (Microsoft SQL Server)
- Able to handle Jarman’s growth
- Pro-active functionality built into package
- Requires ‘customisation’ rather than development
- Easily adopted to support other business functions
- Goldmine is a SALES led Application
- Excellent in-house database disciplines
- Sales Team are **Hungry for Change**
- Goldmine will be easily integrated
- Start of Learning Curve
- Immediate ‘Quick Wins’
The decision was made for the Sales function to implement Goldmine before the Client Tracking function, the logic being that Goldmine was a Sales led CRM, so Jarman could have immediate ‘quick wins’ (for the Tiggers) and start to understand Goldmine thoroughly before it is customised for Client Tracking (the Eeyore).

5.4.3 Goldmine

After the selection process of ‘Buy or Build’ and once File Maker Pro was finally eliminated from the selection process a decision was made by the board members to go with Goldmine. This was not a logical or rational process, as those involved were not IT-literate or, indeed, due to use the systems on a daily basis, though they were making their selection from the finalists of previous auditions conducted by the IT staff member. Surprisingly though, the board members, even though they were all predominately sales people, made the decision chiefly because of the persuading ‘sales parlance’ of those selling the product. Nevertheless, the Goldmine product was an obvious choice, matching budget and flexibility to map the client tracking system. Until there was a significantly persuasive sales pitch from the IT suppliers, each business function would be dealt with on an individual basis, with no plans for a holistic solution. The sales business function area had been selected to be dealt with first so ‘quick wins’ could be gained from a workforce who were becoming ever more disillusioned, tiring of the struggle with ‘imploding’ databases.

Generally, sales processes are supported by numerous ‘off-the-shelf’ CRM systems available in the marketplace. Goldmine is a CRM created for the SME market with in-
built scalability for expanding and distributed organisations. Every facet of the client/customer’s relationship life cycle is managed, from a potential opportunity to a firm customer. There is instant access to customer information; histories, sales, all contact details with business processes are standardised and there are automated triggers for future activities. Additionally, there are embedded analytical tools that facilitate strategic management decisions, future marketing campaigns and the generation of diverse reporting for both internal and external use. All information and knowledge is centralised but can be accessed remotely, for mobile users and satellite offices. These were functionalities that the sales teams needed and wanted.

However, the research and client services functions were unique to Jarman and it was generally accepted that these functions required a bespoke build that would be integrated with the chosen CRM at a later stage. Goldmine principally matched both requirements and the budget for the Jarman sales function so a deal was struck. Once work began on the sales function, requirement gathering gained momentum again for the sales function, licences and hardware were purchased, the Vendor conducted a familiarisation of business processes exercise at Jarman, and a hasty meeting was requested with Rupert. A solution was suggested, that the CRM had the functionality not only for the Sales function, but could also be customised for both the Research function and the Client Services function. Rupert was again persuaded of the feasibility of the proposal and preliminary work was stopped as the new enterprise-wide customisation project had to be scoped. The client tracking project was postponed for the first time.

In summary, the Client Services function was scoped, requirements gathered, File Maker Pro was eliminated and Goldmine was selected out of a number of options. Goldmine is a CRM so it was a logical diversion to firstly use Goldmine for the Jarman Sales function. There was the opportunity to learn the product before it is customised for what was a complex business function that was still very much paper-based. Sales requirements gathering began in earnest, and Goldmine licences and hardware were bought. Once the vendors began to understand the business processes at Jarman a hasty meeting was arranged and Rupert was informed that the Vendors could customise both the Research Function and the Client Tracking function. Sold on the idea, work stopped on just dealing
with the Sales function and a company wide scoping of requirements began. It was at this point when the CRM application became an Enterprise Resource Planning (ERP) system.

The CRM that was initially selected for the Sales function was being customised to accommodate the Research function, the Client Tracking function, and the Accounts function. The issue of feasibility, when raised by some Jarman personnel, was silenced by Rupert, who believed the Vendors’ sales parlance, even though there was an admission by the Vendors that a project of this nature had never previously been embarked upon. There is, however, a given compromise that package software necessitates some degree of software configuration together with some standardisation of existing business processes and, as observed in this situation, there is also a critical reliance upon on the customising/programming expertise of the Vendor.

Figure 5.10: Goldmine screen-shot
The situation that confronted both Vendor and the Jarman personnel was that each business function had individual databases with individual personalised front-end/interfaces that all eventually had to blend into one screen. There were core contact details at the top of the screen with five permanent displayed hotspot fields for frequently required data. Each business function was allocated a number of views of relevant data on the bottom half of the screen that were displayed, similar to a card index with tabs that you selected (see Figure 5.10). Immediately, two major problems were raised: firstly, that each function, even though there was a staggered implementation planned, had to have all their processes ready, to be mapped against Goldmine, at the same time. This presented huge resource demands for all functions, especially as the Client Services function was not yet even an automated process. Their second problem was the shared core contact details and hotspot fields that sat at the top of the screen; each function argued that their data was of importance and warranted the prime position on the front screen. The concern was that the current File Maker Pro database gave ‘at a glance’ views of data while Goldmine required a number of mouse-clicks to locate relevant data. These problems had to be resolved among the function managers, together with a scoping of the overall implementation project. A Goldmine Steering Committee was decided upon. The steering committee, the GSC, drew from the rest of the staff base to make Goldmine work and reported to the IT Practice Group who were responsible for IT development more generally within Jarman. In turn, the IT Practice Group reported to the Financial Management Team (FMT) who reported to Rupert and the Senior Management Team (SMT). The organisational actors totalled 50 at this point, the whole of Jarman’s workforce (roles shown in Table 5.9). In addition, the Vendor’s technical consultant, who was facilitating the configuration of Goldmine was co-opted onto the GSC at the request of Jarman’s Managing Director to indicate the strength of the working partnership.

<table>
<thead>
<tr>
<th>Organisational Actors</th>
<th>Role in the Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Management Team</td>
<td>Required regular feedback and to be made aware of any major incidents. Their role was to make the ultimate</td>
</tr>
<tr>
<td>Role</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Financial Management Team</td>
<td>decision based upon knowledge and information delivered to the GSC via the FMT.</td>
</tr>
<tr>
<td>Financial Management Team</td>
<td>Their main concern is financial planning and they put the project on hold twice because of poor sales performance.</td>
</tr>
<tr>
<td><strong>Goldmine Steering Committee</strong></td>
<td></td>
</tr>
<tr>
<td>GSC Chair</td>
<td>Overall Chair and a facilitator for each functional group.</td>
</tr>
<tr>
<td>Functional Chairs: Sales, Research, Client Services and Accounts</td>
<td>A member of staff from each department tasked with managing the process of requirements gathering and their incorporation in the design of Goldmine.</td>
</tr>
<tr>
<td>Functional Champions: Sales, Research, Client Services and Accounts</td>
<td>A member of staff from each department tasked with managing the promotion of the new system to the rest of their group.</td>
</tr>
<tr>
<td>Functional Knowledge Workers: Research, Sales, Client Services and Accounts</td>
<td>A member of staff from each department responsible for providing information and process requirements as deemed necessary by the Functional chairs.</td>
</tr>
<tr>
<td>IT Facilitator</td>
<td>To ensure that the existing IT infrastructure was factored into the Goldmine development trajectory.</td>
</tr>
<tr>
<td>Vendor – the Technical Consultant</td>
<td>Included to ensure they were aware of the project and as a political manoeuvre by the MD to ensure the commitment of the vendor.</td>
</tr>
</tbody>
</table>

Table 5.9: Goldmine Steering Committee (GSC)
Four GSC Teams were created and led by the Functional Chairs of Sales, Research, Clients Services and Accounts. Each was tasked with deconstructing and reviewing their business processes, and scoping the project against a pre-set timeframe with existing resources. The teams had to ensure that each function did not conflict, creating an integrated workflow. This was a huge responsibility with added accountability to the named Functional Chairs. The teams were also expected to squeeze the additional workload into their already burgeoning work schedules. Moreover, the Researchers, Business Development Managers, and Management Consultants were having to perform a system analyst role, one they were not trained for. The teams met virtually and face-to-face, two or three times a week. The pace was quickening and the work-rate intensifying. A key reason for the pace quickening was that what was perceived as expensive hardware had been purchased at the time the decision to go enterprise-wide had been made several months earlier. Therefore, an SQL server sat in the corner of an office slowly gathering dust, slowly becoming more obsolete. The team was constantly reminded that this investment needed utilising as soon as possible by senior management. Additionally, as this was a company-wide project, members of each team were not necessarily based at the same location. Some work was conducted locally but team members were expected to travel to other offices to get the job done. Long hours became the norm as teams introduced GSC working breakfasts and lunches, and conducted meetings as they travelled by using mobile phones.

The requirements that each team arrived at had to be constantly approved by the Vendor, thus ensuring that all suggested activities could be configured. We could see this was a frustrating and often wearisome exercise as the teams were surfacing the limitations of the CRM product once it became an ERP. The Vendor had not previously stretched the application across multiple business functions, and was therefore in unfamiliar territory. The GSC teams therefore spent a lot of time deconstructing and defining processes, only to be told by the Vendor these could not be operationalised. Basically, the vendor did not know about enterprise operations, as they were ‘specialists’ in the functional area of CRM. Therefore, they could not guide the GSC to examine and build processes in a particular way that would be supported by Goldmine. To make matters worse, decisions were sometimes reversed by the Vendor or not adequately dealt with by Senior
Management. There were two displays of resistance that can be drawn upon from this period. The first came directly from this hectic period in an attempted ‘coup’ or display of solidarity against Rupert. The second example came when Rupert tried to control overt resistant behaviour from the Career Consultants. Due to Goldmine implementation being radically altered, the Client Services component was pushed back even further. A pilot study was suggested to try and encourage and illustrate to the Career Consultants what changes to expect once the system was in place. Resistance in this case was successful. Nevertheless, Rupert was still re-emphasising the Tigger and Eeyore metaphor to instil his controlling techniques to avert resistance.

5.4.4 Metaphors Usage: No Complaints, No Eeyores

Eeyore and Tigger continued their awkward presence at Jarman (or was that just my opinion?) and popped up in the most unusual places. Communication sessions and workshops were arranged to inform staff of the changes they should expect. These sessions were always described as open forums but the reality was that nobody was brave enough to query any issues. The slide below (Figure 5.11) was used in a number of communications to the workforce. One of the bullet points, which reads, ‘Ensuring – Nobody can Complain they were not consulted!!!! (No Eeyoring)’, refers to these open forums. An animated Tigger bounced behind these words and the final slide showed Eeyore under a rain cloud. A dramatic click of the mouse places a large red cross over Eeyore.
Project Steering Committee
Why?

• Goldmine at heart of CMC
• Involvement of all Staff/Users essential
• Champions for each department/office
• Objective view
• Ownership established of Goldmine
• Reduce Change Resistance – No surprises
• Ensuring - Nobody can Complain they were not consulted!!!! (No Eeyoring)

Figure 5.11: Tigger bouncing around the Goldmine presentation
Figure 5.12: No Eeyoring at Jarman
5.4.5 Resistance 4: The MC becomes vocal

The Professional Practice Team was made up of three Managing Consultant (MCs), the Research Manager and a Regional Sales Director, had attended numerous requirement gathering sessions for their business area, which is labelled the Client Services Function. There are two distinct areas of this function that had to be meshed together: Client Services, and Research for the Goldmine implementation. One entails the collection of knowledge about the paying Client, for example, contact details, position held upon starting with Jarman, the salesperson who gained the business and also all the intelligence that will be gained as the client travels through their ‘journey’ towards a new position. This will be all the research campaign data, CVs, letters and, finally, all the accepted job information. The second area is the monitoring of the journey, which has been referred to throughout the Goldmine preparation as the ‘client bar coding’, the use of a bar coded package being dispatched with the capability of being verified if needed at any point in its journey. This was becoming a sensitive issue because Scan, the Managing Consultant, argued that a package is not being monitored but a person, and this is where some conflict lay.

The Professional Practice Team decided that the ‘client bar coding’ function should be phased into the procedure once the client services function had become established with all the administrators. The Team hoped for a ‘slim’ chance that once the client information was inputted, stored and manipulated in a formal structured manner this may be sufficient to monitor clients as individuals rather than packages. There were two dilemmas that faced the team. The first dilemma was that the major data collectors were external consultants who are self-employed and self managed. Members of this team were involved in the Career Consultant Pilot Study that forms the next section. The client bar coding requires them to input detailed information after every meeting, but currently, as previously mentioned, the Career Consultants were storing all the client meeting notes off-site and were reluctant to change. This system would be designed to closely monitor their activities, which would be a huge cultural change. The second dilemma was that the tracking would impose a rigid timeframe with set milestones plotted against the client-predicted length of time at Jarman. If one client activity is late then this has repercussions
at every stage. The system will be configured as if every client has the same needs and requirements. Exceptions reports will be used to monitor the journey of the client and to manage the effectiveness of the MCs by senior management. There were mutters that this had all the signs of a bus journey and not the taxi journey that was constantly referred to - for example, that ‘Jarman want to switch from managed time to real time. Traditional organisations run like buses, with routes to follow and schedules to meet. We want to be like taxis responding to a waving arm or a voice crackling on a two-way radio.’

However, the decision to separate the two areas was not discussed with Rupert, who had a distinct view of how he wanted the client bar coding to work. The team had decided that they should stand together on this. However, the team members involved were scared of Rupert and of what his reaction would be, as he was not approachable when discussing issues that he already had an opinion upon. The team was in denial that this situation was different. There had always been the claim that the GSC had empowered the different teams with the responsibility to make decisions but the reality was different. The team members had often discussed at previous meetings that this was a group decision that would have a huge impact on how they managed their different regional offices and that they should stand together as a group. They report the team’s activities to the GSC once a month and present to the Senior Management Group every three months.

The project’s final stages coincided with the Senior Management Group meeting. The setting as always was informal, with casual dress, and the meetings are held away from the office at a country hotel. However, Rupert had been made aware of the decision to separate the Client Bar Coding from the first stage. After dinner, when all attendees were talking informally, Rupert asked Scan, the Managing Consultant of the Team, ‘Has the Client Bar Coding timeline been added yet?’ Scan replied assertively, “Err, no, the team have not yet decided whether the Client Bar Coding will be added immediately. It will probably form phase two.” This was not the answer that Rupert wanted, so completely ignoring Scan, he turned to another member of the team and asked the same question. Agitated, the weaker team member answered, “Yes, but we are still deciding upon the actual duration of a couple of activities.” Rupert replied, “Marvellous, marvellous, if you require any input, please ask,” and then left the group. This was a very public show of
dominance from Rupert and highlighted a lack of team support and display of vulnerability from one of the team members.

The evening ended with dinner and Rupert took the opportunity to speak with the assertive Sean afterwards. He informed him that three Senior Directors had made the comment that he was 'negative' and that this attitude often pervaded many meetings. Though Sean asked for names, none were given. However, later in the bar a 'so-called' colleague shouts out to Sean in a completely different conversation, 'Oh come on, don't be so negative, don't be an Eeyore', with the response of 'hear, hear' shouted from Rupert. The embedded control of resistance being attributed to negativity was a constant presence at Jarman. Rupert has successfully dominated his workforce with the powerful use of the dynamic 'Tigger' and the negative 'Eeyore' metaphors. This section of Goldmine was conducted after the observation study was completed.

5.4.6 Resistance 3: The Pilot Crashes

A blame culture was prominent at Jarman, reflecting Rupert's personality and style of leadership. The 'name, blame and shame' them (a phrase often used by Rupert) approach was used in every situation that required any action or input from the staff. For example, it was common for Rupert and other managerial staff to send e-mails to those in the organisation, naming unfortunates that had broken rules or had not completed tasks within set timeframes. In one incident, I sent an e-mail to Rupert that had an obvious spelling mistake. The e-mail was returned, CCing in the rest of the workforce. It was a public humiliation 'and a lesson to you all' to ensure that 'all correspondence, no matter how trivial, should be spell checked!!!'. He had aggressive controlling techniques and all staff had at some time experienced an intimidation session.

As shown in the previous resistance scenario (1.3.5 Resistance 3) a pilot study was decided upon to attempt the altering of a decade of embedded working practices in preparation for implementing the 'client tracking'. The current process of sharing client information was ad hoc, informal and lent itself to an elusive, intangible approach, with the Career Consultants being selective about what information they wanted to be held
centrally. However, this method of working can further be explained when the complexity of the overall procedure is revealed. Those closely involved in releasing and updating client information were not only the Career Consultants, but a varied group from a broad spectrum of Jarman hierarchical organisational levels: administrators, Career Consultants, Sales Directors (BDMs), and Rupert. The Consultants generated the lion’s share of the information but the BDMs (or Rupert) who introduced the clients into Jarman have to start the process off, or, as it was often described, to ‘Tigger it off’, also co-ordinating the end of the journey. The Administrator had previously entered data and updated details on behalf of her colleagues. Each individual had their own agenda, concerns and dilemmas when confronted with the mandatory involvement of a pilot study to alter business processes in preparation of Goldmine. Multiple techniques of data collection were used, working closely from the requirement gathering stage, and there was interviewing of a cross section of users that, if not directly involved in the process, contributed or reacted to triggered activities that the process produced. As each version of the pilot study was presented, reactions and responses were gathered. This pilot was not a new idea sprung upon unwilling actors; there is documentary evidence that discussion and meetings had taken place since 1999 about how to capture client information and knowledge. Once the pilot study became live, all the mandatory activity was monitored on a daily basis.

Table 5.10, below, allows the explanation of the Pilot Study group’s current role with the existing system and the details of what was required of them throughout the study. The timings of the Pilot Study were adjustable, in that an objective outcome was to alter embedded behaviour and it was mutually agreed that rigid timeframes at this point may be to restrictive. Senior Management was aware that opposition to the mandatory Pilot Study would be the universal response to the planned changes. This was confirmed by the reaction of the Career Consultants at the requirement gathering stage and reiterated when the Administrator reported that from the outset the pilot was being avoided. The MD devised the name, shame and blame strategy to avoid resistance, to ensure that the pilot would be a success.
<table>
<thead>
<tr>
<th>User Groups</th>
<th>Current role with the existing system</th>
<th>Role in the pilot study</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>Role involved keeping database current, often required to answer analytical requests, maintain factually correct data for monthly board reports. They currently enter key data onto a database from paper forms, e-mails, verbal instructions and personally seeking data directly from clients</td>
<td>Monitor the usage of pilot system, report and collect instances of misuse. The role was to police all activity, naming individuals that did not conform which meant reporting more senior people to their superiors (Not a natural role but some enjoyed the power)</td>
</tr>
<tr>
<td>Rupert (MD)</td>
<td>Little input but as the founder was closely involved with the current design so demonstrated parochial issues</td>
<td>If Administrator was police then the MD was judge, jury and executor</td>
</tr>
<tr>
<td>Consultants</td>
<td>Supplying data to Administrator via a paper based form which should be completed with the client on the first meeting (this then triggers the financial process and an invoice should be sent to the clients previous employer)</td>
<td>The pilot study was an attempt to change working practices by encouraging the release of client data, the timely inputs of data and ultimately exposure to new process of data entry but firstly paper based</td>
</tr>
<tr>
<td>Sales Directors (BDMs)</td>
<td>Their role is to conduct the introductory client meeting and start the New Client Form (NCF),</td>
<td>Meet with the client and start the (NCF) must include client program. This is where they stop</td>
</tr>
</tbody>
</table>
(Reporting to Rupert but held position on the Board) which also includes the client’s details and also importantly the product/program being sold. This ultimately determines the length of time, which level of research activities, the class of care contact with the client (there are many instances of NCFs not being started so no-one is aware that the client is requiring consultancy sessions. They return to the process once the client has job and complete a success survey.

Table 5.10: The Pilot Study Group

- The Administrator

Historically, the Administrator was the member of staff who usually inputted new client data into File Maker Pro. The data came from a new client form that was completed by a Career Consultant and handed to her. With the implementation of the Pilot Study, additional data also had to be input into the system, and, moreover, Career Consultants were expected to input their own data wherever possible. The plans were for all meeting rooms to have a Goldmine terminal and the consultants would input data directly throughout each meeting. The Administrator resisted the pilot for a number of reasons because she had to input extra data into the system and her (perceived) power base was being eroded. These were points of resistance because a) she had to undertake additional work and b) because, prior to the pilot, she was the key person in the organisation that maintained the client data on the system. The implication of the change in the latter situation seemed to her that her role might eventually become redundant or changed significantly in a way that would downgrade her status. In terms of her covert resistance strategy, she vocalised and exaggerated the instances of incorrect data entry by others, and continually highlighted the fact that other people could cause big problems if they were allowed access to the system. Thus, she created an atmosphere of uncertainty surrounding the pilot. The naming and shaming did not overcome her resistance activities because the role she wanted was to input the data so she was never going to be shamed.
Indeed, she compiled the naming and shaming list for Rupert and this actually supported part of her strategy of resistance – to show that other people being involved would make the system fall down.

**The Consultants**

This group of organisational actors were powerful, as being self-employed allowed them some protection from company protocols and Rupert's managerial style. New clients were matched against their skills and expertise and they were paid monthly, usually regardless of how often they met with the client (this was based upon a mutually exclusive relationship with Jarman), ending once the client became recruited. The Administrator input crucial client data, but the majority of client data throughout the recruitment campaign was stored off-site with the consultants. The consultants submitted monthly reports about their clients to the Administrator and she inputted the data, but this was on an ad hoc basis in different formats, and any immediate client updates were usually collected verbally. The Pilot Study required details of all client-consultant recruitment activities - CVs, networking, speculative letters - to be captured, and client meetings to be logged centrally. The Career Consultants resisted the perceived panoptic monitoring, as they did not want all client-consultant activities scrutinised. They were currently managing the recruitment campaign and they did not want to share their knowledge or expertise. Like the Administrator, they resisted the Pilot Study because their powerful positions were under threat. They were also required to contribute to this threat by inputting the data themselves.

Their reasons for resistance were their apprehension of a reduction in power and perceived status, a dilution of their knowledge. The current private client relationship was to become public and all meetings logged, which may impact on their fees if the quota was not met and the anticipation of non-paid 'secretarial' work of inputting data was not part of their role. There was also a real fear of the new technology, a fear that they could not learn new skills (Career Consultants were predominately near retirement age and some were IT illiterate). Conspiring and emulating each other, the Career Consultants
became an imposing force. They added extra alarmed voices by highlighting inadequacies and shortcomings of the Pilot Study, new procedures, and questioning the confidentiality and security risks of centralising highly sensitive private data. Their tactic was to simply ignore initial attempts to release this depth of information until directly asked (the Pilot Study dissolved before this stage was reached in earnest). A further tactic was avoidance, creating a chaotic problematic situation when attempting to enter data. This was helped enormously by the fact that Career Consultants were to share PCs with part-time staff members, with claims of the system not working, being too busy and requests for formal training to be organised. More Career Consultants arranged meetings away from the office to further avoid confrontation regarding the Pilot Study. The 'name, shame and blame' strategy had a short and sharp impact - after the initial shock there was a dissolving of the effect. At some stage nearly all the Career Consultants had been publicly 'named and shamed' and there was a realisation that they were part of a reciprocal relationship and that as a group they were strong.

- The Sales Directors (BDMs)

The Sales Director conducted an introductory meeting with every new client and matched them with a Career Consultant. This involved arranging a meeting on site at Jarman offices. A new client record should be triggered (or tiggered) and basic contact data was collected alongside details of what programme the client was on. This data collection was very informal, sometimes completed on a paper form and handed to the Administrator for inputting, at other times e-mailed. In some cases the Administrator would be told to collect the required information on the second client visit as the Sales people were too busy at the introductory meeting. This would add days or weeks to alerting the Client Services and Research team that there was a new client to be dealt with. The Sales team members were Directors so there was an immediate resistance to the requests for a formal structure of how they worked, and the anticipated extra workload of populating the pilot with mandatory data was completely frowned upon, without Rupert observing. They did not want explicit details of the sales deals between themselves and the clients being made
public because although services were standardised there were anomalies in practice among the sales team, to offer variations of the services to tempt clients into finalising deals. They resisted on many levels with the additional fear of technology - like the Consultants, some Sales Team members were still not fully IT literate. The reason for resistance was partly that because of their hierarchical position in the company they deemed themselves to be above such mandatory activities as inputting data and were against the fact of being policed by the Administrator. The Administrator, who was appointed as the person to ‘police’ the pilot, was placed in a dubious position, having to inform on her superiors to their superiors. The Sales Directors were not directly affected by the ‘name and shame’ campaign as they simply requested the Administrator to input the data that they should have been inputting, because she could not refuse their orders to do so. As a result, the structure broke down, which contributed to the Pilot Study’s crash.

• The Pilot Study that failed

The endeavours of the project team to initiate the pilot scheme and change embedded working practices was always predicted to be a long slow process but the extent of resistance was not anticipated. The ‘name and shame’ list was produced, the Administrator kept a list of anomalies on the client system with the names of those individuals involved, and it was made clear that no one was exempt. Each week Rupert e-mailed the ‘Name and Shame’ list to the whole company, for he perceived resistance as a dysfunctional behaviour that required eradication, regardless of consequences. This ‘Name and Shame’ strategy did not allow for any differentiation of the actors involved in resistant activities nor did it facilitate any attempt to understand why these senior professionals, external Career Consultants or administration staff resisted. Resistance succeeded, ‘Name and Shame’ strategies failed. Why? The act of naming and shaming actually supported the Administrator’s resistance strategy, to show that numerous people inputting would create data quality concerns, confirming that other people being involved would make the system fall down. In overlooking the fact that Consultants were not directly under the company’s governance but critical players of the client service delivery
team contributed to the failure. Resistance tactics (highlighting inadequacies of the Pilot Study and questioning the confidentiality and security risks of centralising highly sensitive private data and overtly declining any attempts to enforce co-operation) were successful as the ‘Name and Shame’ strategy failed. Those involved were desensitised after the initial impact. The Career Consultants were members of a mutually reciprocal relationship and the balance was tilting; they, as a group, would not be intimidated. The ‘Name and Shame’ strategy failed when used against the Sales Directors because of their hierarchical position in the company. They used their status to avoid being placed upon the shame list by requesting the Administrator to fulfil the mandatory procedures on their behalf and the structure broke down. Eventually the Pilot Study was terminated due to user resistance.

The ethnographical study came to a close in the winter of 2003. The TCS scheme had been a success and the team were put forward for an achievement award. I was invited to continue working at Jarman, working on the Goldmine project. I was happy to stay to continue my research and wanted to be present when Goldmine was actually implemented. The work had been intense but challenging and I also thought my CV would benefit. The project was nearing a Go Live date at the end of 2003, to the point that actual data migration dates had been arranged, diaries had been booked and training rooms had been arranged around the country. There was a heightening of anticipation among the staff. However, sales had been slowing down over this period whilst the company had been expanding and with a touch of cold feet the Board Members made the sad announcement that Goldmine would be pushed back until finances were more buoyant. I had already reduced my workload at Jarman towards the end of the year, due to family commitments. I had never intended to stay indefinitely and become a true member of the Jarman workforce. My attachment to the university provided thin armour to hide behind but I did not need or want to work in such a hostile environment. I left in December 2003, having enjoyed the challenges both professionally and personally and having made some good friends, though not all were that good, and having been invited back for the staff Christmas meal I found myself sat next to Rupert for the third year running to the amusement of the rest of the staff!
5.5 Conclusion

This ethnographical study generated a vast amount of data, partially because the period of the study was three years and I had open access to the organisation. The phenomena under study was how organisational actors responded to extreme change. The study produces evidence of the use of metaphors in IS projects. The emphasis is upon the use of metaphors to coerce certain users into compliance with the management aims, averting resistance. A unique feature of this study is the close observation of organisational actors’ behaviour at such a critical time. It can be argued that other traditional data generation methodologies, like surveys, interviews and limited invited observational periods would not have revealed such insights. Each IS investment project is visited in detail and resistance scenarios are recalled, together with observation of how the use of the Tigger and Eeyore metaphors were employed to avert resistance. The following chapter will augment the case analysis already presented, but with a focus upon positioning this study against appropriate IS metaphor and user resistance literature. Additionally, a further demonstration of how this research study contributes to an identified gap in the IS arena will be included, regarding the growing significance of metaphors as a legitimate research tool and the absence of other IS studies having identified the use of metaphors to avert user resistance.
6 Jarman: Case Analysis

6.1 Introduction

This supplementary case analysis chapter presents the further analysis of the findings from the ethnographical study. The previous chapter already included an analysis of the data as it occurred in relation to the timeframe of the study. This structure was undertaken to maintain continuity in the flow of how the field study evolved. This chapter explores the prominence of a complex network of other underlying dominant metaphors used to control. It may have been the habitual metaphor use in this organisational setting that enabled an almost submissive acceptance of the Tigger and Eeyore metaphors. In this chapter the emphasis is on the positioning of the findings in relation to identified IS metaphor and user resistance literature. A closer enquiry of how this research study contributes to the identified gap in the IS arena, regarding the growing significance of metaphors as a legitimate IS research tool, will also be included. Lastly, it is important to establish the absence within other IS studies of identifying and reporting upon the use of metaphors to coerce certain users into compliance with management aims and to avert user resistance.

6.2 The use of Metaphors at Jarman

"It is through metaphors that we make sense of strange, novel or complex situations. We do this by casting the unfamiliar in terms of something with which we are familiar."

(Akin and Palmer, 2000: 70)

Metaphorical language was identified as being widely used and accepted by all at Jarman throughout the period of study, before and during the explicit hegemonic use of the
Tigger and Eeyore metaphors (see Section 6.1.2.1). Accompanying the Tigger and Eeyore metaphors was a complex network of other underlying dominant metaphors. These metaphors have been highlighted in the previous chapter and are expanded upon in this chapter. It may have been the habitual metaphor use in this organisational setting that enabled an almost submissive acceptance of these two influential metaphors. The case data evidence illustrates the continuous use of metaphoric language throughout the IS projects with documentary proof that there was metaphor use before the ethnographic study started. This dominant metaphor network supported Rupert's objective to control those he saw as potential resisters, preventing the smooth implementation of his IS investments. However, it would be naive to suggest that simply introducing novel metaphors into an organisation, with the purpose to coerce the workforce to behave in a controlled way, would be received without question. Jarman was experiencing intense change, the environment was unpredictable, and if Rupert was having a bad day then everybody had a bad day. It is worth acknowledging Akin and Palmer's (2000) warning that it is not only the metaphor itself which wields the power and strength but also the orator (Rupert), the deliverer who produces the influence. Bergman (1982) and Gibbs (1996) also agree that it is the power of the speaker that instils direct authorial control. In contrast, Ramsay (2004) believes that the characteristics that are interpreted from a metaphor are not under the control of the giver or orator but rather it is up to the receivers as to how they are perceived. Ramsay's (2004) viewpoint may be valid if analysing text-based metaphors. However, if the orator is domineering and in a powerful position, these additional features must add additional strength to a delivered metaphor. The evidence indicates that efforts of the workforce to resist new technologies and ways of working were thwarted by the fear of being labelled an Eeyore.

### 6.3 Metaphor Analysis

Inns (1997) developed a preliminary taxonomy, to make sense of the complex and diverse use of metaphor, which was adapted for this study. For the purpose of this metaphor analysis, the categories from the taxonomy that have been selected to aid understanding of the metaphor usage at Jarman are the root metaphor; metaphor used as a qualitative tool and metaphors used as a hegemonic tool to influence behaviour.
6.3.1 Root Metaphor

As previously reported, the root metaphor highlights the dominant perspective or way of 'seeing'. The root metaphor often structures the thought process that can be observed through language, images or symbols that are predominant within the research location. At Jarman the observed root metaphor in this context was the notion of forward movement, or of propelling forward (see Section 6.1.2.1). This reflects the period of accelerated expansion at Jarman at this time. There was a constant drive for the organisation to expand, but having got as far as they could, there were high expectations of how the two IS investments could facilitate this. The notion of the road map, motorways, may indicate that Rupert and his management team were struggling in deciding the right strategic direction for Jarman. This was a crucial pivotal time for the organisation, and they relied heavily upon academics at The University of Salford for guidance.

Grant and Oswick (1997) split the metaphor research into the ‘organisation of metaphors’ as Inns (1997) has done with the taxonomy, and then ‘metaphors of organisations’ involving analysing discourse, narrative and images, as has occurred in this study. The authors suggest that the identification of a root metaphor can act as a window into the organisation (1997). The root metaphors are a way of understanding an underlying meaning from those delivering the message. It can be argued that two themes emerged at Jarman. Firstly, there are root metaphors being strategically positioned by the management to reassert an overriding message of control to the workforce: this is how you should act, in a Business Class manner; this is how clients will be treated, they take taxis rather than a bus, requiring a bespoke service; they will also be taking a personalised journey, the Client Journey. A Road Map was produced as a guide of how the technology could be used to achieve Rupert’s objectives. Rupert wanted to influence and control every aspect of the client’s experience but as the company grew he could not physically do this. However, he was passionate that his vision should continue, so through a form of coercion he stage-managed how his workforce will act. Grant and
Oswick (1997) further suggest that when root metaphors are used to conceptualise a situation the imagery may be central to the course of action that is then considered to deal with the given situation. It is therefore important to identify and discuss the root metaphors in a given discourse because they may act subliminally via a conceptually guided approach. Each metaphor is elaborated upon in section 6.1.2.1 and cross-referenced back to the case data in Chapter 5, where applicable.

A second theme emerged when analysing the root metaphors at Jarman, of what actions should be taken in order to meet Rupert's objectives. These were clearly signposted at strategic points to the workforce. Rupert's face superimposed upon the famous the 'USA Needs You' propaganda poster is an image used in the induction presentation for new staff. When the image flies in, an energetic round of applause can be heard. This immediately conjures up the image of being recruited into the Jarman army, being asked to go to war and fight for your company, that these are the actions required from new recruits. A further fighting image is one of Rupert walking on stage to the 'Eye of the Tiger' music, the Rocky film anthem. This again reiterates to everyone that Rupert expects certain behaviour from the workforce, in that they are ready to fight and to scrap, winning against all odds. Dunford and Palmer (1997) argue that metaphors present certain actions as legitimate and essential, and that ultimately the activity becomes depersonalised so organisational actors can distance themselves from their own responses. Akin and Palmer (2000) have observed the communication of a meaning or situation of events to others through a metaphor mechanism. The authors argue that metaphors have the influence to portray what is happening with an added dexterity of suggesting what actions should be taken. An illustration to support their argument is of a CEO talking in terms of 'outgunning' the company's competitors and 'kicking butt', conveying a very different message through use of metaphors from a CEO who talks of 'cultivating' and 'tending' to core competencies to augment strategically. This phenomenon has also been observed in this study, once the Tigger and Eeyore metaphors were introduced. How the Tiggers or indeed the Eeyores at Jarman behaved did not have to be fully explained, since the metaphors were powerful enough and the workforce was already intimidated into Rupert's mode of working. Each metaphor defines and reminds those exposed to it, and, unpacking the metaphor, shows which way the organisational
strategies should be viewed, together with the expected behaviour necessary to achieve the objectives, in this case, Rupert's intentions.

6.3.1.1 Theme 1: The ‘how’ root metaphors

Client journey: This metaphor was continuously used to describe the complex process that the client experiences during their time at Jarman in the pursuit of employment. Part of the Jarman lexicon, this metaphor was spoken, used in presentations internally and externally, found on documentation; it was part of the fabric of Jarman. There was historical evidence that this metaphor was in use when Jarman was being established. The journey was always described as being emotional as well as practical. There was a departure date but the arrival was open and the destination unknown at the start of the journey. Every client travelled their own unique journey in a vehicle of their choosing. Alvesson and Skoldberg (2000) with many others (see Table 5.1) suggest that metaphors are often relied upon when a completely new experience requires some guidance in understanding. The clients are presented this metaphor of a journey, a familiar concept, to explain the process of CV writing, gathering industry intelligence and interview skills, which may all be unknown, especially for individuals that have been in the same organisation for twenty-five years.

Client taking a taxi rather than a bus: This metaphor could be observed after the migration project as the power of the technology was slowly being realised by the senior management. Used in communication meetings, the metaphor once accepted by the workforce became part of the external sales presentations, for example: ‘Jarman wants to switch from managed time to real time. Traditional organisations run like buses with routes to follow and schedules to meet. We want to be like taxis responding to a waving arm or a voice crackling on a two-way radio’. This reasserted or warned those involved in client services that change was afoot. The switch from managed time to real time explained the proposed technology that was threatening to be implemented and alter working practices.
The clear message projected to the workforce was: ‘this is how our clients will be treated.’ As Rupert would often add, ‘Lets face it - when is the last time any of our clients actually caught a bus?!’

**Client road map:** This metaphor was used heavily as part of the ‘Working Smarter not Harder’ project, in conjunction with the Pilot Study that failed. A client administration manual was produced with a view to guide users in the changes to newly streamlined standardised business processes and to introduce new mandatory procedures. This was an intensive period of work that was aimed to change long term embedded working practices. This metaphor was observed part-way through the second IS investment period. This again reinforces the dominance by which the workforce was coerced into working.

**Business class service rather than an economy class:** A ‘business class service’ was also an overused metaphor at Jarman. Business Class surveys were conducted amongst the workforce, Business Class away days were undertaken to ensure that Jarman had a ‘business class’ attitude, so as to avoid developing an ‘economy class’ reputation. There were infamous events that were discussed and relayed, almost as ‘war stories’, to new staff members regarding the constant attempts to maintain higher standards, referred to as a ‘business class’ (as opposed to ‘economy class’) service. This involved focus group sessions and ‘away days’ outside the workplace with the opportunity to talk frankly and freely. This practice was stopped after a particular period when blunt opinions were swapped between the Sales team and the Client Services team, which were not received with enthusiasm. There was name-calling and there were personal comments made regarding dress-sense and working practices. This was unacceptable behaviour but an indication of the void on every level between the two major teams. It was this tribal characteristic that the MD observed, attempted to disperse, but manipulated when convenient. It was seen as ‘healthy competition’ and was possibly the foundation of the Eeyores and the Tiggers. These sessions were conducted just before I arrived but recollections could still raise a heated debate when the study was coming to a close three years later. A second memorable consultation exercise was an attempt to reinstate and re-emphasise the Business Class service culture. Again this exercise backfired remarkably. The event took place after the Migration project as part of a re-evaluation exercise of how
Jarman was perceived by its clients. A Careers Consultant who worked at Jarman was deployed to speak candidly with members of the organisation regarding their observations of how the business class service was perceived and could be improved by the workforce. Reporting back explicitly to the Senior Board members, the Career Consultant took Rupert at his word and presented an honest representation of staff opinions. It took the Career Consultant more than a year to maintain the level of work he enjoyed before the Business Class report. He was constantly overlooked when clients were matched to Career Consultants. “He shot himself in the foot” is how a senior board member recalled the process of crossing the MD. This metaphor again reinforces how Rupert wants his workforce to behave, and his attitude to the ‘messenger’ again puts out a warning to staff that they must not question his decisions. These are continuous warnings of how Rupert expected his staff to behave and illustrations of what happens if you do not behave.

**An aeroplane being built:** This metaphor was used to emphasise the need to be prepared for the next stage in the client’s progress. As the main body of the plane was being built the wings were built concurrently. Both components need to be ready in time.

**A runner:** Preparation, be prepared - a runner cannot just run a marathon without preparation but in slow incremental stages the runner builds up stamina and endurance.

**A jet engine:** This was how the IS infrastructure was referred to, especially the hardware. The jet engine was key to propelling Jarman towards success in the future. The importance of the IS was constantly reasserted by Rupert.

**The driving seat:** A familiar term used to indicate who the leader is, moving a situation forward, used at Jarman in a variety of different ways. Rupert was often in ‘the driving seat’, and the company’s aim was to put clients back into ‘the driving seat’.

**A parcel being shipped/a bar coded client:** Technologically enabling a client’s progress to be monitored at any time, giving the stage and progress of clients at Jarman via a unique code. This metaphor was contradictory given that it was Jarman’s claim that each
client had a bespoke journey in a ‘taxi’ but with the introduction of the technology the journey was being streamlined and slowly becoming a ‘bus’ journey.

**Visual - Motorway image:** The image of the motorway indicates the complexity of the client journey and was used when client requirements were being gathered. The message is that the client journey is a complex concept so to find your way around a ‘road map’ is required. This is how Rupert expected his workforce to perform in order to achieve the organisational objectives.
Jarman likened their major competitors to sausage factories. This image was often used in communication and recruitment presentations. This emphasises the notion that their major competitors, because of standardised processes for guiding clients (on their ‘journey’), were producing inferior products. Rupert presents what others are doing and explains how the workforce should act. Grant and Mack (2004:409) propose that ‘employees of an organisation should take their cues from the leaders. As a result, morale, performance, and loyalty are subject to great influence.’
6.3.1.2 Theme 2: The ‘actions or behaviour’ root metaphors

Hookers and rugby forwards: Metaphors for teamwork are common. Gibson and Zellmer-Bruhn (2002) discuss the application of a number of metaphors to teamwork. The majority of teams have similar characteristics - what the team do, who is on the team, why the team exists. Team structures are also similar - they each have a captain, a coach, distinct roles and relatively defined objectives. The sport Rupert used at Jarman for teamwork metaphors was rugby, but a slightly skewed use of the team metaphor was observed. It was in particular rugby team positions that an emphasis was placed, predominantly the Hooker. The Hooker uses his feet to 'hook' the ball in the scrum of players and is considered to be one of the most dangerous positions on the team. It is also worth noting that Hookers possibly make the most tackles of any player on the field. This was a common metaphor used for the sales team and for how they should behave and for the aggressive strategies that should be employed when faced with the opposition, an implied ‘prescription for attitude and team behaviour’ (Gibson and Zellmer-Bruhn 2002:110).

Visual - ‘USA Needs You’ propaganda poster: Forceville (2002) argues that not much has been written on metaphorical images. A number of alternative metaphors have been observed and included in this study, as visual metaphors are as valid as verbal metaphors, and draw on pictorial or some other visual devices that suggest characteristics in order to encourage metaphorical insight through watching or observing. Below (see Figure 6.2) is the propaganda poster of a military image of Rupert calling people into battle. This was always used in new staff induction sessions. Winsor (1996) argues that this military metaphor is perhaps one of the oldest and most common organisational metaphors, suggesting that this may be because it romanticises the notion of business as a heroic endeavour. Part of the presentation that accompanies the image is the phrase ‘To fight the common enemy’. There are alternatives of application of the military metaphor in Winsor’s (196) study: he offers the manager as a general and as a lord. Rupert positions himself with the image below as the all-powerful general who commands the support of
loyal foot soldiers. However, Rupert was lord of his manor, country based on a large farm (staff members were invited there for away days), the proud owner of a pair of shotguns and he would go hunting, his wife would fox hunt and they were involved with breeding hunting dogs. Winsor (1996) adds that a business can be appropriately conceptualised as a fiefdom. ‘Fiefdom’ was a Rupert word and there was often much discussion regarding the definition of this word for new staff members and new clients, and about whether this word should be used in clients’ letters. This organisational military metaphor emphasised absolute discipline and obedience generated through fear.

Figure 6.2: USA Needs You poster
Sound - The Eye of the Tiger Music: Picture the scene: a crowded conference room, the lights go down and the music starts. The ‘Eye of the Tiger’ is played as Rupert walks onto the stage and with a little shadow boxing the music stops. Everyone claps and laughs but a message has been communicated. The use of music from the Rocky movie indicates that Rupert is ready to fight and defend Jarman. Rupert used this entrance before the project began in winter 2000 and stopped during the following year in 2001. Why he stopped using this stage entrance was not explained.

“Risin' up, back on the street

Did my time, took my chances

Went the distance, now I'm back on my feet

Just a man and his will to survive

Chorus:

It's the eye of the tiger, it's the cream of the fight

Risin' up to the challenge of our rival

And the last known survivor stalks his prey in the night

And he's watchin' us all in the eye of the tiger"12"

Image - The brain: As the organisation began to grow so did the workforce and consequently so did the management team. The former Chairman famously drew a brain in a brainstorming exercise on how to resolve the situation. The management team were various parts of the brain and the business functions were the torso and the limbs. This
was a powerful domineering metaphor, highlighting who was thought of as the intelligence and re-emphasising the subservient role of the workforce being controlled by the brain. When I asked what part of the body he thought I was, Rupert peered over his reading glasses and said, “Do you really want me to answer that?”

6.3.2 Metaphor used as a qualitative research tool

The second category to be used in this analysis process is the use of ‘metaphor as a qualitative research tool’. Metaphor is becoming a legitimate research tool. The metaphor review conducted for this thesis offers a good deal of evidence to support that fact, more so in alternative disciplines to IS. The somewhat acceptance in other disciplines is supported by empirical research, from a variety of professional sources; academics, practitioners, consultants that metaphor can be used and is used as a valuable qualitative research tool. The interpretation of metaphors in use within organisations, it is argued, can offer the reviewer access into hidden insights and opinions about which the organisational workforce may not be aware. This is also evident when looking at the root metaphors in play at Jarman. On the other hand, interpretation may reveal insights and opinions that the workforce or management are consciously attempting to conceal (Neilson 1992; Marshak 1993; Barnett 1996; Broekstra 1996; Chia 1996; Clegg and Gray 1996; Inns and Jones 1996; McCourt 1997; Alajoutsijarvi, Eriksson et al. 1999; Akin and Palmer 2000; Gibson and Szellmer-Bruhn 2002; Haslam, Postmes et al. 2003; Lamberg and Parvinen 2003). The review offered little published evidence of other studies centring upon metaphors being selected and applied by a member of the organisation to blatantly influence behaviour. Existing studies were generally found to be investigative in nature where organisational metaphors may reveal underlying behaviour or were introduced to aid a change process. This study differs dramatically, because Rupert introduced the metaphors to coerce users, and in turn so does my use of metaphors as a qualitative research tool. My research approach is qualitative in nature, as I have looked for metaphors to generate data.

12 Lyrics from the song Eye of a Tiger can be found at http://www.lyrics007.com/
6.3.3 Metaphors as a hegemonic tool to influence perceptions and interpretation

This category, from Inns’ (1997) taxonomy ‘metaphors as a hegemonic tool to influence perceptions and interpretation’, examines the communicative role of the metaphor and its ability to evoke emotional responses from those targeted by hegemonic language disguised by creative language. The role of metaphors to influence has been looked at in detail in Section 1.2.1.1 where there is some blurring, as role of the root metaphors could also be described as also being used in a hegemonic manner. In Rupert’s selection of the Tigger and Eeyore metaphors (creative language) and his deployment of this powerful hegemonic tools he coerced and bullied his workforce. As mentioned previously, there was a network of metaphors being exploited to guarantee a subservient and compliant workforce and this is possibly why Tigger and Eeyore were accepted so readily. The objective was, in this instance, to use metaphors to coerce certain users into compliance with management aims for the IS projects and to avert resistance. This study sits comfortably within this category, in looking at how the use of Eeyore and Tigger influenced perceptions and interpretation within Jarman leading to the company becoming so completely Tiggerised. Tigger started appearing throughout the offices, sitting upon computer screens and on mouse mats. There were Tigger pens, Tigger mobile phone covers, Tigger birthday cards, Tigger earrings and, in one worker’s car, a Tigger suctioned himself against the window. Another example of how Tigger had influenced perceptions was when Eeyore was removed from a Winnie the Pooh-themed jungle gym and cot mobile. Rupert reassured: “Don’t worry, Sarah, we have taken the offending Eeyores off the contraptions. We want the boy to be a Tigger, don’t we?” The whole of Jarman had become coerced into needing to be a Tigger and to not being referred to as an Eeyore. This concept moved into general Jarman talk when one worker was crying at her desk because of a work matter. She said, “I don’t want to be an Eeyore but I can’t help it.” Another comment, made to a person who could not be bothered going out as it had started to rain, was: ‘oh don’t be such an Eeyore and get your coat.’ Rupert imaginatively introduced Tigger and Eeyore to Jarman and because of his managerial style the bullying was disguised by dressing it up in furry natives of 100 Aker Wood. Rupert prepared the environment to openly bully and dominate people without being
openly vicious. This can be seen when Rupert is organising a site visit with team leaders to choose networked printers and photocopier. He asked, “Will I need my Horsebox if I am going to be transporting Eeyores around, or will the Jag do?” Inns (1997) adds a health warning that there is a sinister and purposeful function of using metaphors as hegemonic tools to alter perceptions, to nurture emotions in an exploitive manner which will then influence and reshape participants’ perceptions. In this instance the sinister and purposeful function was aimed for and achieved by Rupert, Jarman’s MD.

6.3.4 Gap in metaphor-based IS literature

The metaphor review of this thesis builds upon Inns’ (1997) ‘Preliminary Taxonomy’, accepting her invitation gratefully, of using this taxonomy as a framework for other metaphor focus studies. In this instance the taxonomy was utilised for structuring the metaphor literature identified for this thesis. There are other review-based metaphor studies but it is generally accepted that they are limited (Inns 1997). Consequently this thesis makes a valid contribution in ‘plugging’ that gap. The scarcity of the review-based metaphor studies presents an interesting conundrum regarding the reasons for this. This question still remains unanswered but the IS discipline lacks a degree of substantiated metaphors studies. Identified studies are Winsor (1996) who conducted a rigorous review of the usage of the military metaphor perspectives employed at an organisational level. Dunford and Palmer (2000) also conducted a comparable search of metaphorical language, limiting their research boundary to Management Studies practitioner literature with a distinct focus upon one premise of metaphors, corporate downsizing. Other studies include Sapienza (1985) who conducted a comparable study but this time focusing upon senior management decision-making discourse. Similar to Dunford and Palmer’s (1997) study, her research is also of articles located in practitioner publications. The contributions of such a structured review of metaphors, utilising Inns’ (1997) categorisation process, compiled for this study are various:

1) Fictional home of Tigger and Eeyore in the Winnie the Pooh books

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• A currently unique review of metaphor usage in the Information Systems discipline

• A complementary review of metaphor usage in the Organisational Studies discipline

• A building upon of Inns' (1997) existing study, thus provoking further commentary and discussion regarding the enhancement of the preliminary taxonomy model, as the author invites

• Revealing of a unique usage of metaphor research: senior management introducing metaphors to ignite a change process. The literature review has many examples of organisations to be observed by external practitioners analysing the organisational language to establish underpinning root metaphors that may guide the workforce, identify problems or how metaphors are introduced to alter culture and behaviour. Metaphor has often been used as a qualitative research tool, but the distinctiveness of this study is the observation of management selection and deployment of metaphors to introduce change or influence behaviour. The norm is the introduction of specific metaphors, by external agents or consultants, in a strategic manner to induce a change reaction (Akin and Palmer 2000; Pearce and Osmond 1996; Cleary and Packard's 1992). No other study was identified throughout the metaphor literature review that presents this alternative lens of organisational management knowingly using a metaphor to initiate change. There are few, if any, studies comparable to this study, of Jarman's use of Tigger and Eeyore.

6.4 User Resistance at Jarman

“Resistance is a complex phenomenon which defies simple prescription.”

(Hirschheim et al, 1988:398)
Individual users of information systems often respond in different ways to technological changes, ranging from total rejection through to moderate rejection of some of its functionality. Other responses can be demonstrated resistance, passive resistance, reluctant acceptance or full acceptance. At Jarman, because of the Tigger and Eeyore metaphor, there was an overwhelmingly reluctant acceptance to the extreme changes faced by the workforce. Additionally, demonstrated resistance was further witnessed when Rupert attempted to persuade, through intimidation, a diverse user group into new working practices. In both of these efforts of user resistance demonstrated at Jarman, resistance becomes a reaction, an indicator of users attempting to realign the change processes. There are conflicting opinions and perspectives concerning how resistance is viewed in the IS community. Hirschheim and Newman (1988:398) offer a sympathetic response but this is not a universal opinion within the IS community. ‘Because change is often accompanied by uncertainty (real or perceived) there are good reasons for accepting resistance as the normal behaviour of individuals and groups,’ they believe. A more general opinion is that resistance can be understood as the intentional acts of commission or omission that defy the wishes of others (Ashforth and Mael 1998). This is most definitely the perspective taken by Rupert when faced with potential resisters at Jarman.

As previously noted, Dickson and Simmons (1970) suggest three generic categories of behaviour that can be demonstrated by a user:

- The first category is aggression, a behaviour that denotes an attack, either physical or non-physical, the sole purpose of which is to injure or harm the object that presents the change. Initially there was no recorded evidence of physical damage to any of the equipment at Jarman. A further search revealed this entry after a meeting with a despondent BDM: ‘the slow laptop as reported by Sarah was taken back to IT Support premises. The intention was to rebuild the laptop (or replace the hardware) if found to be faulty. Although no fault was found loading or closing the laptop, and the laptop performance opening applications locally was found to be fine, whilst at Manor Park we tested the connections to the Internet, the VPN and Outlook. This proved very
useful as we had direct experience of Outlook appearing to freeze even though the dialup and VPN connection were OK\textsuperscript{14}. Sarah developed a habit of slamming the lid of her laptop closed once it froze, her frustration publicly noted and sometimes understood, user behaviour that could be described as aggression.

- The second category is projection, a behaviour which projects the blame directly away from the user onto the systems which are causing the problem. This was the main type of resistance observed at Jarman and already linked to the resistant type of behaviour observed in the previous chapter. The Administrator, Amy, could have been described as master of this projection behaviour in both the Migration project and the Client Tracking Pilot Study. Amy was very vocal in her views regarding her hardware. She had two PCs and both were reported to freeze. In attempts to eliminate this fault, a PC known to have no problems was swapped for one of her PCs and the PC it replaced worked fine with another user. The new PC was still found by Amy to be problematic and she took the next new PC that arrived, which had been ordered for a new member of staff. Finally she blamed her PC problems on the amount of static created from the carpet, but she was an older worker and struggled to accept change. Her desk area was in a central position of an open plan office and initially she managed to gain sympathy but everyone soon tired of this. Often staff would ask, “she’s not moaning again is she?”

- The third category is avoidance, a behaviour that is less visible, as it involves the users protecting themselves through avoidance of the system or by withholding from the system. The Career Consultants and the Regional Sales Managers classically achieved this type of resistance, avoidance, in the Pilot Study. They withheld their knowledge from the system whilst using their power to coerce the Administrator to populate the Pilot system for them. They created several tactics to design themselves away from the system. They were too busy to input the required details and asked the Administrator or they

\textsuperscript{14} Taken directly from a report ‘Collated Overall IT Issues’ but with names changed.
complained that there was no available machine to use, until they slowly stopped using the Pilot System altogether. User resistance was successful in this instance.

6.4.1 Resistance Behaviour at Jarman: overt and dysfunctional or covert and passive?

The IS community have opposite opinions and assumptions regarding resistance and consequently there is also a wide range of views about how resistance should be dealt with (Hirschheim and Newton 1988; Friedman and Cornford, 1989; Wilson, 1999; Grover et al, 1988). Hirschheim and Newman (1988) argue that resistance can be a positive and legitimate behavioural response to technological change. The authors even go as far as suggesting that resistance should be encouraged because in some instances all change is neither productive nor beneficial. Additionally, they argue that change should actually be an accepted normal reaction to proposed change because it evokes uncertainty, either real and/or perceived. Davis et al (1992) further warn that IS practitioners should not jump to a conclusion and suggest that resistance behaviour may be a rational response by a rational user to a dysfunctional situation. This sensitive attitude to users caught up in a process of IS change was not observed at Jarman. Realising that his workforce may resist the proposed changes, Rupert introduced the influencing metaphors. Typically, the IS community regard resistance as deviant and irrational and it is the problem of the resisters (Friedman and Cornford, 1989; Wilson, 1999; Grover et al, 1988; Hirschheim and Newman’s 1989). Hirschheim and Newman (1989) echo the assumption, which perpetuates because resistance conjures up the image of opposition or conflict, and subsequently there is a need to suppress resistant behaviour and intentions. Rupert definitely endorsed this style of control. As offered in the previous chapter (Figure 6.3: No Eeyoring at Jarman) the four screenshots of a communication presentation to the staff inform them that they have had an opportunity to voice any concerns so now ‘No Complaints’ can be made and the following figure of Eeyore with a red cross is displayed. The workforce at Jarman is not given the opportunity to resist. The presentation slides were regularly included in communication sessions as a reminder or warning to all. User resistance evoked a negative reaction and is often accompanied by an
unconstructive stance that resisters may cause unlawful or unwarranted actions. The result is potential approaches from the organisation to deal with the resistance rather than to understand the source. In Jarman’s case, Rupert was not very interested in trying to understand the source; instead, his major objective was not letting any disruption affect his organisational expansion goal. An assumption can be made that Rupert’s attitude to resistance will not be unique, especially in SMEs that neither have the resources nor patience to absorb IS failure.

Figure 6.3: No Eeyoring at Jarman
6.4.2 Passive resistance: Migration Project?

'Covert behaviour that results from both fear and stress stemming from the intrusion of the technology into the previously stable world of the user.'

(Marakas and Hornik 1996: 208)

A common feature of the IS resistant studies is a focus on passive resistance, especially covert behaviour. Lauer and Rajagopalan (2003) suggest that passive forms of resistance are both hard to detect and problematic to cope with. Users may demonstrate a reluctant acceptance, with no outward displays of frustration or rejection of the system. The authors continue to build a profile of the passive resister as one who has resentfully accepted the system in the role for which it has been intended. A further passive resister's response may be the customisation of working practices, for example, the user who works differently to how the system was designed, attempting to 'outsmart' the system. Finally, there is the maverick resister of the new system, who may silently scheme and conspire in the downfall of the system and deliberately cause sabotage and eventual termination of the system.

Though the resisters at Jarman were passive, they did not display any of the above responses, and there were no obvious conspiracies although they did resent the PCs, preferring Apple Macs. Marakas and Hornik (1996) and Lauer and Rajagopalan (2003) focus their attention on acceptance of the new IS systems as the flipside to resistance and to the diverse nature of passive resistance. Both studies include reference to the use of mandatory systems, and the authors draw attention to the logical assumption that resistance will be through covert techniques since overt resistance would result in sanctions. It is difficult for the user to indicate resistance or acceptance on a mandatory system that forms part of the job description. Lauer and Rajagopalan's (2003) opinion of mandatory systems addresses the complexity of resistance more directly by adding that apparent system usage may mask passive resistance or resentful acceptance. Exposing

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Passive resistance is difficult as acceptance based on user attitude or usage will possibly fail as a result of users concealing their true objectives. They further argue that a user may exhibit acceptance and resistance concurrently, towards different facets of the system, depending on stance, knowledge, control, or politics, which suggests that resistance could coexist alongside acceptance. Individual organisational actors involved in the Pilot Study illustrated this dual position at Jarman. They accepted (reluctantly) the turmoil of change throughout the Migration Project and raised no concerns regarding the Goldmine implementation but chose to resist an isolated project.

6.4.3 Overt resistance: Pilot Study

The pilot study failed due to overt resistant behaviour, an attempt by Rupert to assume that all users no matter what organisational status or how much experience they had, would react to the resistance prevention strategies. Resistance, to withstand or oppose, immediately invokes the image of confrontation, hostility or conflict, and negative dialogue often being used by those initiating the change or those facilitating the change. Newman (1989) proposes that this tactic strengthens and privileges management's position, so justifying the need to succeed over the interests of the users. If there is a lack of commitment or willingness to change, this can be seen as a precursor to indifference and deliberate resistance to implementation. Rupert's attempt to manipulate individuals into cooperating in the Pilot Study by using a 'one size fits all' strategy (Name, Shame and Blame) illustrates Newman's (1989) findings very closely. Again Hirchheim with Newman (1988) report upon a variety of studies that have explored behavioural attitudes that resistance to change evokes. The conducted review of studies presents a wide range of potential behaviours and reactions of users, due to the diverse group of individuals experiencing change. Aspects of these findings are also reflected in the Pilot Study at Jarman that was stopped due to resistant behaviour. The users were from a range of professional statuses, from director to secretarial support, and each user group was interacting with different aspects of the system, each had different levels of IT skills and each group had different professional relationships with Rupert and the company.
Findings of the Hirchheim with Newman (1988) study include but are not exclusive to:

- Comparable users, depending on the different variables that the users interact with, can experience change completely differently; no two user's experiences will be the same.

- Any user group is diverse because of the professional status, professional experience and emotional intimacies of its members.

- This diverse group is not unique but shares common features with potentially all user groups involved in IS projects.

A study conducted by Jiang et al (2000) echoes this argument further. Using Kling's (1980) theoretical framework, their argument is constructed from three components: people-orientated, system-orientated, and interaction theories. The user group at Jarman that resisted each struggled with a potential shift in power or responsibility. The Administrator was fearful that her job would be replaced by the system, as she was currently the sole holder of knowledge on client progress. The Regional Managers/Directors believe that they should not have to input data, that they are too busy and it was a clerical duty. Finally, the Career Consultants were self-employed so did not really have to conform to new strict procedures, and they currently held client information and industry knowledge that they did not want to share on a centralised system.

Findings of the Jiang et al (2000) study include but are not exclusive to:

- What is interesting is that central to this theory is the perception that systems acquire different social and political meaning in different environments and that different users also react to the same system differently.
• It can be argued that a well-designed, correctly specified system is resisted because there may be a potential shift in power relations or of social status because of the system’s capabilities.

• The authors argue that the ‘real reasons’ for resistance are the perceived values and social content gain or loss of ‘users’ that occur before or after system implementation.

This hybrid explanation of resistance suggests different outcomes for the same system in different settings, or different responses by the same group of users to different systems and substantiates the reason resistant behaviour succeeded at Jarman (Jiang et al 2000). However, organisational approaches tend to deal with the resistance rather than to understand the source.

6.5 Metaphors and resistance

The case data reports on how a range of metaphors were employed to coerce certain users to comply with Rupert and management aims for the IS projects and to avert resistance. There has been little research conducted in the coupling of resistance and metaphors, as interrelated in this study, in IS and in other disciplines. However, Abel (2004) makes this connection, arguing that a consequence of change is how all aspects of the organisational structure are affected, resulting in stress, some loss regardless of any gain and resistance. Metaphors, he argues, are proving to be highly effective linguistic aids to the reduction of uncertainty and resistance. Abel (2002) draws on Morgan’s work to suggest that if the metaphors are creatively employed they may be beneficial and valuable devices to simplify complexities and that they may help reveal perceptions of change and identify points of resistance. Nevertheless this perspective could possibly be described as a little naïve because the role of metaphors hinges upon the framing of metaphors within the organisation and the leadership style within that organisation (Akin and Palmer 2000). The situation at Jarman presents a contradictory setting where metaphors are used to manipulate and coerce in periods of change. Van Dijk (2006) offers some explanation
regarding the characteristics of manipulation discourse, in that it involves power and dominance. This type of dominance is firstly a control of the mind, that is, the beliefs of the recipients are in some way under control. Van Dijk (2006) also adds that to understand manipulation and the characteristics of this style of persuasion it is important to examine the social setting. Fenley (1998) uses metaphors to enable alternative insights into managerial approaches to disciplinary situations. Aspects of Fenley's (1998) research that are pertinent to this study is another use of metaphors in seeing disciplinary practices at work in an organisational setting, and also the discussion regarding the manager-subordinate relationship.

6.6 Summary and Conclusion

This chapter has presented supplementary analysis of the case data with reference to the two distinct literature reviews that were essential for this study, metaphors and user resistance. The previous chapter chronologically presents the case data of this three-year study and for continuity purposes sections of case analysis have been positioned against the timeline of the overall research study. An aim of this thesis has been to report upon a three-year ethnographical study of an organisation experiencing accelerated expansion due to technological change. The focus of the study is how senior management introduced creative metaphors to avert user resistance and how the workforce responded when Tigger and Eeyore ‘arrived’ in their workplace. In order to straightforwardly identify the key findings from both chapters they have been summarised and form Tables 6.1 and 6.2.

<table>
<thead>
<tr>
<th>Summary of Metaphor Findings and Contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>• This research study contributes to the identified gap in the IS arena, regarding the growing significance of metaphors as a legitimate IS research tool.</td>
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</tbody>
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230
There has been little previous research identified throughout the metaphor literature review that has presented this alternative lens of organisational management knowingly using a metaphor to initiate change. Jarman’s use of Tigger and Eeyore has little (if any) comparable studies.

‘Windows’ that the root metaphors open into Jarman are of an underlying control. Root metaphors were being strategically positioned by the Managing Director to reassert an overriding message of control to his workforce - this is how you should act, in a Business Class manner; this is how clients will be treated, they take taxis rather than a bus, requiring a bespoke service; they will also be taking a personalised journey, the Client Journey. A Road Map was produced as a guide through the technology of how to achieve Rupert’s objectives.

A second supporting theme emerged when analysing the root metaphors at Jarman regarding what actions should be taken in order to meet the Managing Director’s objectives. These were clearly signposted at strategic points to the workforce. Rupert’s face superimposed upon the famous ‘The USA Needs You’ propaganda poster is an image used in the induction presentation for new staff. This immediately conjures up the image of being recruited into the Jarman army, being asked to go to war and fight for your company, that these are the actions required from new recruits. A further fighting image is one of Rupert walking on stage to the ‘Eye of the Tiger’ music, the Rocky movie anthem. This again reiterates to everyone that Rupert expects certain behaviour from the workforce, that they are ready to fight and to scrap, winning against all odds.

The review offered little published evidence of other studies centring upon metaphors being selected by an insider of an organisation then being applied blatantly to influence behaviour. In turn, this adds an alternative slant to my use of metaphors as a qualitative research tool. My research approach is qualitative in nature but it is the observation of this unconventional use of metaphor that anchors this thesis.

A currently unique review of metaphor usage in the Information Systems discipline
- A complimentary review of metaphor usage in the Organisational Studies discipline

- A building upon of Inns’ (1997) existing study, thus provoking further commentary and discussion regarding the enhancement of the preliminary taxonomy model, as the author quite clearly sees the classification as one that will only ever evolve.

Table 6.1: Summary of Metaphor Findings and Contributions

<table>
<thead>
<tr>
<th>Summary of User Resistance and User Participation Findings and Contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>• An evident limitation that has been explored in depth and throughout the review has been the ambiguity and misuse of the terms ‘user participation’ and ‘user involvement’. There exists a valid argument for a universal definition of the terminology in use, which the IS community must lead and roll out to industry.</td>
</tr>
<tr>
<td>• A further limitation that was also revealed were the voices of academics, both criticising existing empirical and theoretical research and warning that it has not been relevant or rigorous enough, and has been insufficient. Few theoretical foundations currently exist in the literature for explaining user resistance in an IS context.</td>
</tr>
<tr>
<td>• Cavaye (1995) highlighted a frailty of research methodologies in this area. The concern led to a focus upon the use of diverse research instruments with minimal comparable examples emerging from the published literature, preventing cumulative research.</td>
</tr>
<tr>
<td>• The review revealed that system types were not deemed important dynamics or variables, in many cases, when constructing a research rationale. For instance, mandated systems imply but do not deduce the status of the user, whereas voluntary systems suggest that choices in working practices are optional, signifying a decision-making status. If rigorous research is to be realised then definitive system types should, at least, be noted when discussing user behaviour patterns.</td>
</tr>
</tbody>
</table>
Users are often regarded within the literature homogeneously, rather than heterogeneously. The consequences of addressing users as a throng, and so constructing irrelevant and inadequate solutions and strategies, should also be areas of further scrutiny. This was further demonstrated in the 'one size fits all' strategy that Rupert attempted to use against a diverse user group involved in a Pilot Study, when resistant behaviour resulted in the failure of the project.

The observation of user resistance being averted by the use of metaphors. There was little evidence of other studies including this concept as a strategy to avert user resistance.

Table 6.2: Summary of User Resistance and User Participation Findings and Contributions
7 Conclusion

7.1 Introduction

Following on from Chapter 6 that focused upon analysing the case study findings, this chapter extends this analysis further by elaborating upon certain key findings that required extra consideration. This final chapter has three objectives: to review the research objective, evaluate the research process and offer an extended interpretation of the findings from this ethnographical study. Recommendations for future study are finally presented and the study draws to a close.

7.1.1 Review of research objective

The research objective for this study has been to explore the use of metaphors in an IS project. The emphasis is upon the use of metaphors to coerce certain users into compliance with management aims for the project and to avert resistance. Whilst metaphors are slowly becoming a legitimate research tool in IS they have not yet been fully embraced. There presence is still rare at IS conferences and in the top IS journals, could this be a collective suspicion regarding the issue of validity that metaphors may bring to research or is it simple a lack of understanding from within the field. The metaphor literature review highlights that the IS field is deficient in its usage of metaphors as a research tool in comparison to the OS field where metaphors are widely and comfortable used. The use of metaphors undertaken for this thesis provides an alternative, but rich, insight into the nature of mutually reinforcing nature of different types of metaphor within an organisational setting. There is little previous published research on metaphors being observed in use in this instance. Consequently the research in this thesis raises the profile of metaphors in IS research especially where they are used to coerce and influence.
In particular, this research is also concerned with the role of ‘the user’ in IS, more specifically existing assumptions and theories regarding user resistance. The literature indicates that resisters are more often that not dealt with homogeneously rather than heterogeneously in IS. I argue this influences research into and practical approaches towards how resisters are perceived, and managed. The thesis reports on how resisters were coerced into compliance with senior management aims for a number of IS projects.

In order to realise this objective:

- Chapter 2 reviewed existing literature on metaphors both in IS and OS to highlight any commonalities or disparities. A taxonomy was used as a framework to structure the amassed literature. The underlying consideration from this process was the deficiency of metaphor research in IS compared to OS especially in reviewing metaphors in use. The review further highlighted the lack of previous research of the use of metaphors to coerce compliance with management aims for the IS projects and to avert resistance.

- Chapter 3 reviewed the user resistance and participation literature. This was an unravelling exercise to fully understand and report upon how IS researchers generally perceive resistance and participation. The decision to include both the participation and the resistance literature was not to compare the two areas but to distinguish in now distinct the two areas are. Furthermore this also highlighted that there is still a customary habit within the field to blur these research areas.

- Chapter 5 and 6 basically build the picture of the organisational setting and research domain for the ethnographical study. Ethnography is often described as the story of ‘folk’ or ‘going native’ to understand the ‘natives’ so with this in mind a particular effort was made to introduce the key organisational actors. A detailed review of the IS projects is presented to highlight the extreme change and unique conditions that the organisation was undergoing throughout the period of observation. This was not a prescriptive piece of research, rather an attempt to shed rich insight by living behind the doors of an organisation dealing with change.
7.2 Evaluation of research process

The research methodology as set out in Chapter 4 introduces the principles and process used to evaluate the research process of this study. Chapter 4.1.2.3 makes reference to the evaluation of this study given that it is essential to evaluate qualitative research especially that with an interpretative perspective. This is in response to criticisms that are levied at the IS research community. Klein and Myers (1999) set of principles for conducting and evaluating interpretive research are devised from the philosophical perspective of hermeneutics. In particular Section 4.1.2.3 also evaluates the process of ethnographical fieldwork and participant observation as proposed by Atkinson and Hammersley (1994).

7.2.1 Principles for interpretative field research

The following is the set of principles for the evaluation of interpretive field research in IS, the final category, ‘Principle of Suspicion’ is concerned with need for sensitivity to possible “biases” and systematic “distortions” in the narratives collected from the participants has been omitted from the evaluation procedure as it is not relevant.

(Adapted from Klein and Myers 1999)

7.2.1.1 The Fundamental Principle of the Hermeneutic Circle

This principle suggests that all human understanding is achieved by iterating between considering the interdependent meaning of parts and the whole that they form. This principle of human understanding is fundamental to all the other principles.

The principle is that the understanding of the whole is gained by considering the inter-relationships of the parts. The ‘whole’ in this study was to explore the use of metaphors in IS projects. The emphasis was upon the use of metaphors to coerce certain users into compliance with management aims whilst averting resistance. The ‘parts’ were diverse and multi-faceted but the ‘whole’ could not be fully understood without unravelling the parts that made up the physical organisation, the culture, the inter-relationships of the organisational actors, the IS projects, the use of metaphors within the workplace, the coercion, the emotions and on. To list all the parts of this three-year ethnographical study
is of course impossible as they involve the tangible and intangible, building of relationships, gaining trust, and respect, both as a co-worker and as a researcher. My knowledge was gained of the ‘whole’ through appreciating these ‘parts’.

7.2.1.2 The Principle of Contextualisation

Requires critical reflection of the social and historical background of the research setting, so that the intended audience can see how the current situation under investigation emerged.

The timeframe of this research process was over three years, with the company celebrated its tenth anniversary the year the study started. Therefore the study followed this company (Jarman) in its most formative years as it moved from two-sites to a six-site operation and the workforce more than doubled. Being in position at the start of the expansion allowed me to understand and be aware of the changing dynamics the organisation was undergoing. Additionally I gained a ‘before and after’ perspective allowing an understanding of how key members of the workforce adapted and reacted to enforced change. I had access to historical documentation and the workforce filled in the blanks with office stories and folklore. Due to my dual position as a researcher and co-worker I was aware that a blurring of roles would leave to a lack of objectivity. Therefore in order to ensure rigor I relied upon the support, advice and guidance from the academic supervisor on the project. There were also three monthly meetings with external representatives from governmental funding bodies that further reinforced my dual role.

7.2.1.3 The Principle of Interaction Between the Researchers and the Subjects

Requires critical reflection on how the research materials (or ‘data’) were socially constructed through the interaction between the researchers and participants.

The ethnographical, a portrayal of people and cultures in a particular setting, ensures a ‘closeness’ within the research domain with the participants. The researcher is invited behind the organisational façade to observe a ‘warts and all’ view (see 4.2.2).
Ethnographic research necessitates commitment to gain close contact with the observed in their natural habitat building a level of trust, to be factual and descriptive in reporting. As the ethnographer I became the research instrument, reporting on what I observed, my experiences, their interpretation regarding the social, cultural and economic aspects that influence the research setting. I was not an outsider looking in but an insider working within the organisation, alongside the workforce, absorbing the culture, company rules, creating relationships and very much contributing to organisational life and politics. The challenge is to combine the employee and the researcher role so managing a dual role of both an 'insider' and 'outsider'.

7.2.1.4 The Principle of Abstraction and Generalisation

Requires relating the idiographic details revealed by the data interpretation through the application of principles one and two to theoretical, general concepts that describe the nature of human understanding and social action.

Allen and Baskerville (2003) propose that generalisability is a major concern for researchers, given that it refers to or hints at the validity of a theory in a setting that is different from one where it has been empirically tested and validated. The generalising of an IS theory is important not just for research purposes but also for managing and problem solving in industry and society. Given that, it can be argued that generalisability is a key characteristic of positivist philosophical tradition is the establishing universal laws of the phenomena under study. Where then does that leave this ethnographical study? The ethnography study undertaken in this research process sits within the interpretive philosophical tradition that potentially places no particular emphasis on generalisability. In looking for direction Allen and Baskerville (2003) argue that with the interpretive tradition, the validity of a theory only having relevance in the setting where it was developed does not really detract from its validity or scientific status.

"At the same time, interpretivism would not prohibit the researcher from extending his or her theory to additional settings. A key feature of interpretivism that
differentiates it from positivism, and hence also differentiates its approach to
generallability from positivism's approach, is that interpretivism acknowledges the
existence of a phenomenon that is not present in the subject matter studied by the
natural sciences. People, who are integral to the subject matter that a social
scientist observes, develop and use their own subjective understandings of
themselves, their setting, and their history.'

(Allen and Baskerville 2003).

Given this standpoint it could also be argued generalisation is a strength of this
ethnographic study is, the observation of key organisational actors within their familiar
settings. Participant observation has the capacity to reveal much more than formal
interviewing or circumstances when researchers are invited witnesses and presented with
an artificial portrayal of the organisation. There are advantages and disadvantages of
most research techniques it is being aware of the disadvantages and ensuring that the
research is robust and relevant (taken from section 4.2.2.4.1)

7.2.1.5 The Principle of Dialogical Reasoning

Requires sensitivity to possible contradictions between the theoretical preconceptions
guiding the research design and actual findings ("the story which the data tell") with
subsequent cycles of revision.

The theoretical preconceptions altered as a result of this study. In Chapter 4, the
interpretivist underpinnings of this study are given and critiqued. Furthermore, as
criticism is often directed at an (assumed) deficiency in the evaluation procedure of
interpretivism then the researcher must be prepared to self reflect and revise the initial
preconceptions if unexpected research findings emerge. As this was an ethnographical
study the 'story' unravelled and once the research objective was formulated there was not
much movement beyond this but there were revisions.

Initially the two anchoring hegemonic metaphors (Tigger and Eeyore) were the primary
focus and the other metaphors role was not clearly understood until a revisit to the case data. Data had always been collected concerning any metaphors via language, visually or audios observed in use at Jarman. Once the literature and case data were analysed a realisation was made that many of these metaphors were directional and supporting metaphors that additionally coerced and influenced the behaviour of the workforce. A 'shift' was then made to incorporate these additional findings.

Another change was with regard to the data generation methodology. The initial methodology included semi-structured interviews. Once a number of these had been conducted it was immediately apparent that they would not be productive for data generation. The management would begin to resent the waste of resource both the participants and mine and the workforce found the situation of being interviewed, awkward. After gaining advice from my supervisor it was deemed effective to withdraw from conducting interviews.

A further shift was in defining the user. It was not until the resistance and participation literature review was nearing completion and a finding from that exercise was viewing the user as homogeneous rather than heterogeneous. I suddenly realised that I also had not made a distinction regarding the user. This was revised.

7.2.1.6 The Principle of Multiple Interpretations

Requires sensitivity to possible differences in interpretations among the participants as are typically expressed in multiple narratives or stories of the same sequence of events under study. Similar to multiple witness accounts even if all tell it as they saw it.

The ethnographical process conducted for this study involved being exposed to opinions from every hierarchical level and from each satellite office throughout the organisation. Every member of the workforce was included at some stage in the study. Alternative perspectives on different situations were expected and always given. There were many episodes when senior management and the workforce's needs or demands were construed
differently. An in-depth understanding of the individuals involved against the context of the situation was often needed to gain a true understanding of the episodic events they occurred. The working environment was routinely intense and overbearing so empathy and sensitivity were also key necessities required when conducting this research. In this study not to have different interpretations of the same sequences of events would have been curious. It is the length of time and familiarity of the organisational actors and research environment that has benefited and contributed in gaining such a rich insight.

7.3 Overall summary of findings

The overall findings from the ethnographical field study at Jarman are summarised in the previous chapter (Chapter 6). In this section the significant findings from the research will be reiterated rather than replicated. This will include a further discussion of how metaphors have been so far portrayed in the literature in comparison to the alternative observed use of metaphors in the field study.

Typically metaphors are understood to be a linguistic device whereby one phenomenon is understood in terms of another. Put another way, metaphors enable us to make sense of a strange and novel situation by casting the unfamiliar in terms of something which we are familiar (Drummond and Hodgson 2003; Akin and Palmer 2000). Lundin (2003) further explains that metaphors can be images that aid us to see some aspects, while leading us to ignore others and that they are mind-stretchers on the one hand and mind closers on the other. Whilst there are many definitions regarding what a metaphor actually does, for a metaphor to be effective in its delivery, certain dynamics need to be in place. Without knowing the context of the metaphor and who the author or orator is, then it maybe impossible for a bystander to state categorically what the metaphors means (Bergmann 1982). However, introduce a well-defined context and a real life author and the situation drastically alters. Bergmann (1982) argues that it is the author or orator of the metaphor (in this case Rupert), using a carefully selected metaphor (for example Tigger and Eeyore) to successfully assert their intention (coerce staff into compliance of management aims).
Through the process of this thesis a literature review on metaphors was conducted. As part of the review I attempted to source other metaphor reviews and at this point I naively looked towards IS literature. I wanted to learn how others had structured such reviews and in the hope of finding an easy starting point for understanding the existing metaphor literature. There was none, and this is when I realised the gap in existing studies regarding reviews of contemporary literature for the grouping and classification of metaphors. Fortunately I did find Inns’ (1997) taxonomy within organisation studies.

How the findings from this study differ from existing research is:

- The ethnographical based study allowed for a rich insight to this organisation, many aspects of the research might not have been realised using other research approaches. The story may have been left untold.

- There appears to be little existing categorisation of published metaphor based research other than Inns (1997). The review conducted for this research attempts to plug the gap within the IS field of any classification or categorisation of metaphors used in IS.

- The long-term study of over three years has facilitated research on multiple metaphors being used over time. Additionally this research also highlights an unconventional introduction or planting of metaphors into an organisation, via the Managing Director. The conventional way that has been recorded is for external practitioners or researcher to introduce appropriate metaphors or by listening to organisational discourse and using identified metaphors to reveal underlying or embedded assumption and practices. This usage of metaphor was not observed to be reported upon in the IS field or in other IS related fields.

- This study shows multiply metaphors are used in different circumstances and in conjunction with each other at times, become more powerful as they mutually reinforce each other (see Figure 7.1).
Figure 7.1: Mutually reinforcing network of different types of metaphors

Figure 7.1 depicts what I see as two core hegemonic metaphors, Tigger and Eeyore. Tigger and Eeyore were highly visible at Jarman throughout the ethnographic study that took place late 2000 to the end of 2003. These metaphors were first observed after the migration project started in the spring 2001, (see Figure 7.2). The other metaphors in the diagram were also identified in use at Jarman and each metaphor has a time stamp rather than a date stamp. This decision was made because though I was working closely within the organisation I cannot presume the first time these metaphors were introduced or
mentioned happened to be in my presence. Each of the metaphors in the figure have been summarised in the previous chapter (Chapter 6.2.2) but they are the controlling metaphors, the how things should be done and the action metaphors of the expected behaviour to fulfil the management objectives. I argue that without this habitual underlying control mechanism of the other metaphors, the workforce would not have so readily have accepted Tigger and Eeyore. The ‘context’ was right and the ‘real-life author’ of the metaphors was overpowering enough to ensure that the metaphors were effective in their role to coerce certain users into compliance of management aims for the IS projects whilst averting resistance.

Figure 7.2:(original source is Figure 5.1: IS project timeline at Jarman)

7.4 Recommendations for future research

Throughout the process of conducting this study several research possibilities were raised. A limiter must be placed on the creating an endless unachievable list so presented
here are those areas that were more significant than others. I have previously mentioned identified gaps in the literature that I had attempted to find in order to assist my research and this was the foundation of my recommendations for future research.

The review offered little published evidence of other studies centring upon metaphors being selected by an insider of an organisation then being applied blatantly to influence behaviour. Jarman’s use of Tigger and Eeyore has little (if any) comparable studies. Further research might be to look if other organisations have either experienced this style of management or leadership. A colleague from another University has come forward with another example of use of Eeyore as a metaphor in her workplace. Eeyore has been used by a member of staff in my colleague’s department to demonstrate an apathy occurring within her department.

Inns’ (1997) purposely named the taxonomy as preliminary. Future research might be the building upon Inns’ (1997) existing study and thus provoking further commentary and discussion regarding the enhancement of the preliminary taxonomy model. The author quite clearly sees the classification as one that will only ever evolve either to remain within the existing taxonomy or to add to the existing categories whilst restricting the review within the IS field.

Users are often regarded within the literature homogeneously, rather than heterogeneously. The consequences of addressing users as a throng, and so constructing irrelevant and inadequate solutions and strategies might be areas of further research. This was further demonstrated in the ‘one size fits all’ strategy that Rupert attempted to use against a diverse user group involved in a Pilot Study, when resistant behaviour resulted in the failure of the project.

An evident limitation that has been explored in depth and throughout the review has been the ambiguity and misuse of the terms ‘user participation’ and ‘user involvement’. There exists a valid argument for a universal definition of the terminology in use. Future research might be to conduct a comprehensive review of the resistance literature to demonstrate the depth of this problem whilst contributing to the ongoing debate that was highlighted in Chapter 3.
The review conducted of the resistance literature revealed that system types were not deemed important dynamics, in many cases, when constructing a research rationale. For instance mandated systems imply but do not deduce the status of the user, whereas voluntary systems suggest that choices in working practices are optional, signifying a decision making status. For rigorous research is to be realised, then definitive system type should, at least, be noted when discussing user behaviour patterns. Future research might be a review of existing studies indicating if system purpose was stated.

7.5 Conclusion

The objective of this study was to explore the use of metaphors in an IS project. The emphasis was upon the use of metaphors to coerce certain users into compliance with management aims for the project and to avert resistance. This thesis established that use of metaphors to control and influence behaviour was successful at Jarman. The literature demonstrates numerous ways that metaphors have been used from a change management tool, to understanding organisational culture, as ‘window in’ to the organisation and those who work there. A diverse range of metaphors used in previous research has been reported upon from, jigsaw pieces; to ice skating, jazz even a chimpanzees tea party. Nonetheless this study still has distinctiveness, not only with the use of the novel metaphors Tigger and Eeyore but with metaphor research to the fore in IS research and, moreover, undertaking an empirical study of the hegemonic role of metaphors. A further function of this research highlights the power of mutually reinforcing metaphors when applied in a suitable context, so extending existing metaphor research within the IS field.
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