THESIS FOR THE DEGREE OF DOCTOR OF PHILOSOPHY

Getting involved in change:
Enabling distributed change agency through organizational control and trust

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Abstract

This doctoral thesis focuses on distributed change agency for managing change in organizations. Distributed change agency enables organizational members to make the choice to engage in change and act to realize it. The accelerating pace and complexity of organizational change increases the need for distributed change agency – more organizational members need to be involved to realize change. In this dissertation, the change in focus relies on practices of involvement where larger circles of organizational members are part of the change.

Not enough is known about distributed change agency and how it can be managed. In this dissertation, organizational control and trust are explored to learn more about how the development of change agency can be supported. Both aspects are found to play a role for how organizations can enable the development of distributed change agency. The method of organizational control is of less importance for supporting distributed change agency. However, it needs to make sense to organizational members for them to be supported by it. Thus, there needs to be alignment between control methods, personal, and organizational goals. In order to dare to act and possibly take a risk there needs to be trust present in the organization, trust in both colleagues and organization and in the change per se. I suggest that control and trust can be seen as catalysts with which the organization can enable the development of change agency and manage change agency. Furthermore, practices of involvement are found to be ways an organization can distribute and mange change agency.

In this dissertation, I contribute theoretically by adding to our knowledge about distributed change agency. I also add to research on managing change by suggesting how organizations can manage change agency. Furthermore, I add to the view and tradition of driving change with a greater number of organizational members involved.

The dissertation is based on four papers looking at reactions and practices during changes characterized by involvement and by the implementation of something new – in terms of new ways of working and collaborating around new products or strategy. Two of the papers are based on action research studies and two of the papers are based on multi-case studies.

Keywords: Distributed change agency, Trust, Organizational control, Employee involvement, Change management, Organizational change

List of appended papers

Paper 1
Pregmark, J. E. & Berggren, R. (2021). Strategy workshops with wider participation: trust as enabler. *Management Decision,* 59**,** 586–603.

This is a collaborative work where the Johanna E. Pregmark and Rita Berggren contributed equally to analysis and writing. However, Johanna E Pregmark contributed solely to data collection and research design.

Paper 2
Berggren, R., Pregmark, J. E., Fredberg, T. & Frössevi, B. (2020). Change in Tightly Coupled Systems: The Role and Actions of Middle Managers. *In:* Noumair, D. A. & Shani, A. B. (eds.) *Research in Organizational Change and Development.* Emerald Publishing Limited.

All four authors collaborated in writing this paper. Data collection was mostly done by Rita Berggren with some help from other team members (Clara Strömbeck and Lisa Nyhav). Analysis was mostly done by Rita Berggren.

Paper 3
Pregmark, J.E., Fredberg, T., Berggren, R. & Frössevi, B. (forthcoming). Learning from collaborative action research in three organizations: How purpose activates change agency. *Accepted for publication in Journal of Applied Behavioral Science.*

Johanna E. Pregmark, Tobias Fredberg, and Björn Frössevi were mainly involved in the research design and empirical work. Rita Berggren subsequently collected supporting data. Johanna E. Pregmark, Tobias Fredberg, and Rita Berggren developed the paper through analysis and writing.

Paper 4
Berggren, R. () Take the Leap: Developing Change Agency for Innovation. *Submitted to Journal of Change Management*

This is a single-authored paper. Research design, data collection, analysis, and writing were done by the author.

Other publications

Kronblad, C., Pregmark, E. J. & Berggren, R. (2023) Difficulties to Digitalize: Ambidexterity Challenges in Law Firms. *Journal of Service Theory and Practice,* 33(2), 217–236.

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Rita Berggren
Kungälv, August 2023

Table of Contents

ABSTRACT ..... **III**

LIST OF APPENDED PAPERS ..... **V**

ACKNOWLEDGEMENTS ..... **VII**

1 INTRODUCTION **1**

1.1 RESEARCH QUESTION AND AIM 2
1.2 INTRODUCING THE ORGANIZATIONAL PERSPECTIVE 3

2 THEORETICAL FRAMEWORK **5**

2.1 CHANGE AGENCY 5
2.1.1 Distributed change agency *6*
2.2 ORGANIZATIONAL CONTROL 8
2.3 TRUST 10
2.4 ORGANIZATIONAL CHANGE THROUGH INVOLVEMENT 12
2.4.1 Change readiness and resistance *15*
2.5 THEORETICAL CONCLUSION 16

3 METHODOLOGY **18**

3.1 RESEARCH APPROACH 18
3.2 QUALITATIVE RESEARCH 20
3.2.1 Action research and collaborative methods *21*
3.2.2 Case study *23*
3.3 DATA COLLECTION METHODS 23
3.3.1 Semi-structured interviews *24*
3.3.2 Action research *24*
3.4 RESEARCH QUALITY 25

4 APPENDED PAPERS AND INSIGHTS FROM EMPIRICAL STUDIES **27**

4.1 CONNECTION BETWEEN PAPERS AND THE RESEARCH QUESTIONS 30

5 DISCUSSION **33**

6 CONCLUSION AND CONTRIBUTION **43**

6.1 THEORETICAL CONTRIBUTION 44
6.2 PRACTICAL CONTRIBUTION 44
6.3 FUTURE RESEARCH 45

LIST OF REFERENCES **47**

1 Introduction

Change is an elusive concept that has been captured across multiple perspectives and research domains. Much management research has treated change as the exception, and the desired normal in organizations is often considered as a stable state (Orlikowski, 1996; Tsoukas & Chia, 2002). However, scholars agree that the context for organizations is increasingly characterized by continuous and rapid change (Horney et al., 2010; Mankins & Gottfredson, 2022; Pasmore & Woodman, 2017; Pregmark, 2022). At any point in time, there are multitudes of projects, processes, initiatives, decisions and individuals' actions and inactions creating forward movement in the organization. Authors indicate the practical problem of accomplishing successful change and conclude that many organizations fail (Beer & Nohria, 2000; Pregmark, 2022). Thus, organizations increasingly need to be flexible and skilled at changing (Reeves & Deimler, 2011) and finding new ways of managing change (Pregmark, 2022; Worley & Mohrman, 2016).

Early research on organizational development and change shows that the change agent has always been a central actor. There are several descriptions of a change agent, since its first mention by Lippitt et al. (1958). The general meaning of many traditional definitions can be found in the suggestion by Beckhard (1969, p. 101): "A "change agent" refers to people, either inside or outside the organization, who provide technical, specialist or consulting assistance in the management of a change effort". In these bureaucratic and rational traditions, the change agent is the lone champion that drives planned and orderly change efforts (Buchanan & Badham, 2008; Caldwell, 2005). However, several authors call for a multifaceted view of change agency suggesting that change agents actually implement a broad range of actions and do not merely act as the driver that was once synonymous to the role (Buchanan & Badham, 2008; Caldwell, 2003, 2005; Ottaway, 1983).

The success of change depends on the involvement of organizational members outside the top management team (Lines, 2004). The notion of involvement in organizations is by no means new, however, it contrasts with the dominant top-down view during much of the 20th century. Traditionally, change has been described as primarily designed by leaders and change agents and delivered to organizational members – often denoted as change recipients (e.g. Beckhard & Harris, 1987; Kotter, 1995; Schein, 1987b). However, fast paced and complex change requires contributions from several actors (Caldwell, 2003; Moran & Brightman, 2000); thus, there is a growing need to involve more organizational members in change and support their work (Lines, 2004; Senior et al., 2020). There are several suggestions on managing change by engaging several organizational members and acting on the change (e.g. Amabile & Kramer, 2011; Ancona et al., 2019; Fredberg & Pregmark, 2018; Huy, 2005; Kotter, 2012; Pasmore, 2015). In fact, research treats this type of change – involving organizational members beyond the top management and focusing on collectively evolving the organization and process continuously – as its own kind and different from the traditional top-down approaches (Beer & Nohria, 2000). Involvement increases organizational members' motivation (Huy, 2005) and supports creativity (Amabile & Kramer, 2011), innovation, and flexibility at work (Shani et al., 2009). Furthermore, employees involved in creating and driving change are more often committed to change (Beer, 2009), accepts change, and experience more positive emotions (Oreg et al., 2011). With this dissertation, I join the tradition and view of organizational change with broader involvement. This type of change is the focus of my research.

As more organizational members are (or need to be) involved in change, there is a growing need to consider change agency beyond the traditional singular agent (Caldwell, 2003). However, scholars note that distributed change agency has received little attention (Wylie & Sturdy, 2018) and there is limited knowledge about managing agency for change (Caldwell, 2003). Distributed change agency is a shared

and dispersed phenomenon in organizations, indicating that many co-workers simultaneously act as change agents (Buchanan & Badham, 2008; Caldwell, 2005; Ottaway, 1983). Doyle (2001, p. 321) suggests that organizational members "will seek to innovate, participate in and manage change within and beyond their area of responsibility – they will seek to obtain and exercise "change agency" on behalf of the organization to deliver its strategic goals". In this dissertation I adhere to this definition of distributed change agency and adopt this distributed view of change agents or rather of change agency. Arguably, as we talk about change agency as a distributed concept and a force for change, the relevant discussion turns from agent to agency. In this dissertation, I explore distributed change agency and how it can be supported in organizations as a way to manage change when a greater number of organizational members are involved.

Adjacent streams of theory deal with change management and how to ensure that organizational members work towards defined goals. To mention three that often comes to mind in connection with the focus of this dissertation are change readiness (e.g. Armenakis et al., 1993), organization politics (e.g. Buchanan & Badham, 2008), and principal-agent theory (e.g. Eisenhardt, 1989a). All three streams have attracted scholarly interest and must to be acknowledged although they are not in focus for this dissertation. I will mention all three at more length in chapter 2 and explain why they are disregarded in this thesis.

As already mentioned, research on both distributed change agency (Wylie & Sturdy, 2018) and managing change agency (Caldwell, 2003) is limited and needs further examination. To add to the understanding on distributed change agency and managing changing organizations, this thesis focuses on two concepts: organizational control and trust. Existing research suggests that control and trust are fundamental for understanding how to manage organizations (Adler, 2001; Ouchi, 1980). Furthermore, the two concepts are central to the quality of management (Ghoshal & Bartlett, 1994). Thus, we know that control and trust are basic concepts of *how to* and the *success of* managing organizations. Arguably, these aspects are also important for our understanding of distributed change agency in organizations, going forward.

In this dissertation, organizational control is defined as "the exercise of power (influence) in order to secure sufficient resources, and mobilize and orchestrate individual and collective action towards (more or less) given ends" (Alvesson & Kärreman, 2004, p. 424). Trust will be considered as "the willingness of a party to be vulnerable to the actions of another party based on the expectation that the other will perform a particular action important to the trustor, irrespective of the ability to monitor or control that other party" (Mayer et al., 1995, p. 712). Additionally, trust is formed by the three bases reason, routine, and reflexivity (Möllering, 2006).

1.1 Research question and aim

To contribute to research on managing change I aim to explore *how distributed change agency is supported in changing organizations*. To clarify, I seek to establish the meaning of distributed change agency and discuss its role in changing organizations. Furthermore, I will look closer at distributed change agency in the particular change context that is in focus for my doctoral project, that is, organizational change with broader involvement. To support my discussion further and put focus on organizational control and trust I pose the following research questions:

i. *How does organizational control enable or hinder the development of distributed change agency?*
ii. *How does trust enable or hinder the development of distributed change agency?*

The basis for this dissertation is four appended papers based on four different research studies. Two studies (paper 1 and paper 3) are action research studies and the remainder (paper 2 and paper 4) are multi-case studies. Through my research, I suggest that organizations must actively enable distributed change agency among organizational members and not focus only on a small number of change agents. Change agency plays a role in how changing organizations can be managed. Therefore, organizations need to support the development of change agency throughout their organization. To support the development of distributed change agency, this study examined two factors – trust and organizational control. Both these factors facilitate in creating an environment that supports organizational members. Furthermore, trust and control can be considered as catalysts that organizations can deploy to influence, activate, and enhance their members' change agency.

This thesis is structured as follows. First, after introducing my research focus and research questions I close this introductory chapter by presenting my perspective on organizations. Second, the theoretical framework focuses on change agency, organizational control and trust. I also provide a theoretical foundation to organizational change and involvement. Third, the methodological chapter presents my research approach during the doctoral studies and how the studies were designed. I present the chosen methods and conclude by discussing the quality of my research. Fourth, the appended papers are presented by their abstracts and main takeaways for this dissertation. I also link each paper to the research questions through illustrative empirical quotes. Fifth, I discuss my research and derive four propositions to answer my aim and research questions. Sixth, to conclude my doctoral dissertation I summarize my work and explain its contributions to theory and practice. I also, recommend areas for future research.

1.2 Introducing the organizational perspective

An organization is "a consciously and formally established entity that is designed to accomplish certain goals that its members would be unable to reach by themselves. It is a managed system designed and operated to achieve a mission, vision, strategies, and goals". (Miles, 2012, p. 7). There are many definitions about an organization, but I will use this as guide.

Likewise, organizational change has been captured in many ways and traditions, all with different suggestions on how it should be managed. For many decades, organizations have been viewed with the lens of stability as the accepted normal (Tsoukas & Chia, 2002). However, change affects all organizations and industries, irrespective of whether it is sparked by internal or external events (Todnem By, 2005). Several authors suggest that to understand how change is managed and viewed, it is necessary to understand how organizations are considered to function (Cameron & Green, 2020; Palmer et al., 2006). Cameron and Green (2020) suggest four metaphors: organizations as machines, as political systems, as organisms and, as flux and transformation. First, using Cameron and Green's (2020) metaphors, the perspective of stability as norm, treats organizations as machines. Typically, in this perspective, change is assumed to be plannable, executed top down, and resistance naturally arise but can be handled (Cameron & Green, 2020; Kotter, 1995). Second, organizations as political systems is controversial as power play or political game of organizations have been seen for many years as something that should be avoided (Buchanan & Badham, 2008). However, organizations increasingly acknowledge and embrace this aspect as well (ibid). Third, in the metaphor of organisms, organizations are considered as living and adaptive systems that match or adapt to the environment. Fourth, from the perspective of flux and transformation (Cameron & Green, 2020), organizations are described as naturally chaotic where change cannot be planned and managed, rather it simply emerges.

In my dissertation, I adhere to the view of organization as organism (Cameron & Green, 2020) and Miles' (2012) definition. Organizations are systems made up by members trying to reach a common goal and where the work and change effort does not simply (or only) emerge but is consciously acted upon. From Miles' (2012) definition, we also learn that the sum is greater than its parts, that is, members of an organization can accomplish more together than what they would by themselves.

As previously mentioned, organizations are increasingly characterized by continuous and rapid change (Horney et al., 2010; Mankins & Gottfredson, 2022; Pasmore & Woodman, 2017; Pregmark, 2022). There is an apparent practical problem of accomplishing successful change and subsequently many organizations fail (Beer & Nohria, 2000; Pregmark, 2022). In agreement with other scholars, my perspective is that change in organizations occur by the actions and behaviors of its members – to some extent everyone is involved and impacted (Kahn, 1974; Moran & Brightman, 2000; Senior et al., 2020). Therefore, I argue that to learn about change in organizations we must understand what is happening among its members while also looking to an aggregate level. To talk about an organization level, we still need to consider its members. Therefore, a guide for reading this dissertation is to keep in mind that I have an organizational perspective where my contribution and analysis aims at managing changing organizations. I do not delve into what goes on within individuals, rather I explore the actions and consequences created by organizational members as the outcome of an organization system.

Organizational change is a response to external and internal events (Tsoukas & Chia, 2002) – these changes can occur in processes, technologies, offerings, structure, strategies and culture. As mentioned earlier, organizational change can be characterized by either a planned top-down approach or by focusing on involving many members and developing as you progress (Beer & Nohria, 2000). Here, the focus is on the latter. This research is based on situations of organizational change in response to introducing something new, that is, new ways of working and collaborating around new products or strategies. I do not look at changes as the outcome of introduction and implementation of new tools (e.g., information technology [IT] or others) or new organizational structures. Although, two of the studies (paper 3 and paper 4) are based on innovation processes, the innovation process per se is not of interest. Rather, in focus are actions and events that come about in the organization as new ways of working and collaborating occur. All four studies have examined changes where organizational members, also outside the top management team, are involved and where these organizational members are not necessarily viewed as change recipients but as actors involved in the change.

2 Theoretical framework

In the theoretical framework, a few different topics will be examined to create the basis for discussing change and agency. All these theoretical approaches will complete the puzzle when discussing the findings of my four papers in the context of how change agency can be supported in organizations.

2.1 Change agency

The locus for the concept of human agency lies within the longstanding discussion and development of the thoughts related to the concept of human free will (Emirbayer & Mische, 1998). The foundational issue is whether individuals act out of free will or if all actions are made within the realms of social structure. Agency or structure has been a central concern for philosophers and scholars over centuries. Bandura (2006, p. 164) argues that "to be an agent is to influence intentionally one's functioning and life circumstances". Thus, agency is always linked to action and agents develop a relationship or interaction with the existing environment that is, persons, places, meanings, and events (Emirbayer & Mische, 1998). Thus, Bandura (2006) conclude that individuals create and interact with structure and one's actions are not just a product thereof. Emirbayer and Mische (1998) argue that human agency has three distinct elements linked to the past, present and future, in their words: iteration, practical evaluation, and projectivity. Developing agency is thus, linked not only to our present environment but also our past experiences and our future beliefs. According to Caldwell (2006), an important step to link agency and change, is Giddens (1976, p. 111) suggestion to connect agency to the possibility that 'a person could have acted otherwise'. This line of thinking implies that intentional action is required to create the change, and thus agency must exist to change an organization.

A classic application of agency in economic and organization studies can be found in agency theory or principal-agent problem. Agency theory focuses on handling the issue of diverging interest between principal (e.g. shareholder, or board) and agent (e.g. organizational members), which results in the agent acting in a self-serving manner (Eisenhardt, 1989a). To avoid this principal-agent problem, different control structures (often termed contracts) are the focus of this research stream (ibid). This theory builds on the assumption that people act based on individualistic utility motivations (Davis et al., 1997). Although agency theory has had major influence on our thinking about organizations, scholars critique that it does not consider the complexity of organizations as it reduces organizational life to focus individualistic motives (Davis et al., 1997). I mention agency theory here as it often evoked when the word "agency" is mentioned. Although it is interesting to consider from the perspective of control and trust, this theory is not discussed in this dissertation. Instead, the focus is on agency for change as an application of human agency in organizational change.

In theory, change agency is discussed in various ways from a sociological and epistemological perspective. Caldwell (2006) presents a meta-theoretical framework on the main discourses found in research. According to this framework, change agency is discussed using four discourses, namely rationalist, contextualist, dispersalist and constructionist, by shifting focus from centered agency to decentered agency, where the former view considers the most centered and planned perspective while the latter takes the most decentered and emergent perspective. Centered here refers to intentional and autonomous actions. Caldwell (2006) emphasizes that these discourses are 'enormously complex' (p.9) and there are no clear-cut divisions between the different perspectives. Moreover, research does not provide a definition on change agency that encompass all discourses (ibid). Similarly, research on organizational change from the early to mid-1900s shows that much of the early research on change agency is in rationalist tradition. Change was viewed as something that could be planned and executed in an orderly manner initiated top-down, and thus change agency was identified at managerial levels (Caldwell, 2005).

2.1.1 Distributed change agency

The view of change agency has evolved since the second half of the 20th century (Caldwell, 2006). Focus has shifted from change agent as the lone champion to describe change agency as a distributed phenomenon in organizations (Buchanan & Badham, 2008; Caldwell, 2005). As the view of agency for change has evolved so has the idea of who change agents are and one definition describes them as "...all who are actively seeking to influence change, regardless of their formal role or job title" (Buchanan & Badham, 2008, p. 7). Suggesting a more elaborate definition, Doyle (2001, p. 321) argues that organizations need members who "will seek to innovate, participate in and manage change within and beyond their area of responsibility – they will seek to obtain and exercise "change agency" on behalf of the organization to deliver its strategic goals". This dissertation uses this definition, which is useful for research with an organizational focus as change agency relates to organizational goals and transcends individual agency. Furthermore, a noteworthy aspect of change agency by this definition is that distributed change agency is not limited to the actions of a change leader. Similarly, when relating human agency to situations of change, Emirbayer and Mische (1998) suggest that actors facing such situations have the potential to develop deliberate and imaginative responses for their actions.

The motivation for organizational members to develop change agency and act on change, even though not formally change leaders, relates to the wish to make a difference and have a positive impact on the organization or their personal situations (Doyle, 2001). From theories on self-efficacy, we know that the perception of competence to deal with a situation influences our propensity to act (Bandura, 1982). With higher self-efficacy, we become more tenacious in our efforts to reach our goals. Similarly, efficacy fosters collective agency, members of a team act on the perceived collective efficacy of beliefs and capabilities (Bandura, 2006). A key strength of distributed change agency is that it facilitates team members to develop in depth knowledge of the change process and jointly improvise and find solutions if required (Charles & Dawson, 2011). However, research suggests that there are challenges associated with organizational control in organizations with distributed change agency. When change agency is more distributed, organizational control becomes a balancing act; too strict control could discourage action, and too little could lead to misalignment and inefficiencies (Doyle, 2001).

Distributed change agency is not explored to the same extent as the traditional champion and expert (singular) agent (Caldwell, 2003; Wylie & Sturdy, 2018). While some authors speak of change agency as a distributed phenomenon in rather general terms and relate to a shared responsibility of making change happen (e.g. Buchanan & Badham, 2008; Caldwell, 2003, 2005; Ottaway, 1983), others focus on units of collective change agency (Wylie & Sturdy, 2018). These units are internal change drivers that are dedicated to delivering change within the organization (ibid). However, it seems that this view of collective and decentralized change agency is strongly connected to the rational view of experts and champions for change – although shared past the singular person. Another stream of research relating to distributed change agency is shared leadership (Buchanan et al., 2007; Gronn, 2002). Shared leadership is a theory that transcends the vertical perspective on leadership (Sweeney et al., 2019) and focuses on the shared responsibility (between multiple or all members) to manage a team towards realizing its goals. In this thesis, I adhere to the former notion of distributed change agency and retain the more general view where change agency can be developed within any member of the organization without limitation to specific change teams or leadership.

Roles and practices of distributed change agency

Ottaway (1983) describes the many facets of change agency through his taxonomy of change agents. He proposes three different categories of change agents; generators, implementors, and adopters, and

suggests ten different change agent roles. This taxonomy illustrates the different phases of organizational change and involvement of many roles. Buchanan and Badham (2008) suggest another taxonomy to support change agency as more than a singular role (originally published in Buchanan and Storey (1997)). Table 1 presents both taxonomies.

Table 1- Taxonomies of change agent roles by Buchanan and Badham (2008) and Ottaway (1983)

Buchanan and Badham (2008)		**Ottaway (1983)**	
Role	*Description*	*Role*	*Description*
Initiator	Idea creator and champion who spreads enthusiasm in the organization	Key change agents	Initiator of change and main driver (Generator)
Sponsor	Supporter and guardian of the change, normally occupying a high managerial position	Demonstrators	Supporter, advocates change (Generator)
Agent or Driver	Project manager and main driver	Patrons	Sponsor and generates support (financial or other) (Generator)
Subversive	Person who resists the change and attempts to block it using different methods	Defenders	An ambassador at the "grass roots" level (p.383) (Generator)
Passenger	Follows the change	External implementors	External person invited to implement change (Implementor)
Spectator	Onlooker, but not actively part of the change	External/Internal implementors	Indigenous to the organization but external to where the change takes place (Implementor)
Victim	Impacted by the change that others have installed	Internal implementors	Person at the locus of change. Full-time implementor. (Implementor)
Paramedic	Supportive co-worker who "helps others through the traumas of change" (p.9)	Early adopters	First group to internalize the change (Adopter)
		Maintainers	The big group that adopts the change while maintaining the current business (Adopter)
		Users	User of the changed product or service (Adopter)

There are similarities between the two ways of describing the roles of change agency. However, the addition in Buchanan and Badham's taxonomy, lacking in Ottaway's classification, are the passive roles of passenger, spectator, and victim, or even the resisting subversive role. This suggests that several people are involved to make the change happen, but they are not typical champions or heavily engaged

in the process; however, they must adapt and actively alter their behaviors. Ottaway (1983) links his taxonomy to Lewin's model of change (i.e., unfreeze – transform – refreeze) which is evident in the chronological structure (generators, implementors, adopters). Furthermore, a difference in these two perspectives of change agents' roles is Buchanan and Badham's (2008) argument that any person can switch between roles and adopt more than one role at a time. Ottaway, on the other hand, highlights this as a great risk and reason for failure.

While confirming the lack of research on non-managerial internal change agents, Balogun et al. (2005) highlight that these change agents have a different outlook from that of managerial change agents as they lack authority. Research links some generic change capabilities to change agents, irrespective of their role, such as communication skills, openness behavior, and tolerant listening (Buchanan & Badham, 2008; Charles & Dawson, 2011). Consistent with the theme, practices aimed at engaging and enrolling others into the change cause are central to the role of driving a change endeavor.

2.2 Organizational Control

Organizational control has a long standing and central position in management studies, and several theories have evolved over the years (Cardinal et al., 2017). The fundamental idea of control in these theories is about influencing the organization to ensure that actions and behaviors are geared towards a common organizational agenda and objectives. However, control can be described and exercised in different ways. Table 2 presents some definitions of organizational control spanning over five decades starting during the early 1960s.

Table 2 - A selection of definitions of organizational control.

Reference	*Definition*
Tannenbaum (1962, p. 239)	"Any process in which a person or group of persons or organization of persons determines, i.e., intentionally affects, what another person or group or organization will do".
Ouchi (1977, p. 95)	"An evaluation process which is based on the monitoring and evaluation of behavior or of outputs".
Ouchi (1979, p. 845)	"Focus on the problems of achieving cooperation among individuals who hold partially divergent objectives".
Simons (1991, p. 49)	"Formalized routines and procedures that use information to maintain or alter patterns in organizational activity".
Cardinal et al. (2004, p. 411)	"Align[ing] employee capabilities, activities, and performance with the organization's goals and aspirations".
Alvesson and Kärreman (2004, p. 424)	"Exercise of power (influence) in order to secure sufficient resources, and mobilize and orchestrate individual and collective action towards (more or less) given ends".

From the above definitions, we can perceive development from the exercise of power over others to ensure correct work output, to a process of influence to align the organization with the common objectives. For the scope of this dissertation, I will adhere to Alvesson and Kärreman (2004, p. 424) definition that organizational control is "the exercise of power (influence) in order to secure sufficient resources, and mobilize and orchestrate individual and collective action towards (more or less) given

ends". The focus of this work is not the political arena and power play that forms a substantial part of research. From a political perspective, getting people to change and come onboard with the agenda at hand is solved by a power play in organizations (Buchanan & Badham, 2008). Rather, power or influence here is the use of formal or informal actions to mobilize and coordinate work in the organization.

Historically, research on organizational control has focused on coercive control systems (Cardinal et al., 2017) and control as information feedback systems alerting managers to issues/irregularities (Simons, 1991). The origins of organizational control can be found in transaction cost theory, contingency theory, and Weberian bureaucracy (Alder & Borys, 1996; Cardinal et al., 2017). All these theories lean on notions such as rationality and that humans act in self-interest first and foremost. Traditionally, control systems are considered as setting standards, monitoring performance, assessing deviation from standards or policies, and correcting the deviations (Inzerilli & Rosen, 1983). One of the most influential theories is Ouchi and Maguire's Behavior-Output model (Cardinal et al., 2017). According to Ouchi and Maguire (1975), organizational control can be divided in two categories: behavior control or output control. In this view, control is exercised by influencing the behaviors of organizational members or focusing on the output and correcting actions to better match the desired outcome. Ouchi and Maguire (1975) suggest that these two types of control serve different purposes. Behaviour control is easily adapted to the local setting and individuals, while output control is an efficient way to allocate resources and guide decisions on a large scale. Since the behavior-output theory was presented, other suggestions have been made to divide control into additional categories.

A closer examination of the distinction Alvesson and Kärreman (2004) suggest for viewing organizational control gives more insight to what the concept entail. Consistent with Ouchi and Maguire (1975), they suggest that control can be viewed in two dimensions. However, this perspective examines the indirect or direct levers of control instead of behavior and output as Ouchi and Maguire (1975). Indirect control affects employees' mindset through influencing goals, norms, emotions, and beliefs to indirectly control organizational members' actions and behaviors. This indirect control can be found in research under different names, normative, socio-ideological, concertive, and cultural-ideological control. Direct control influences behaviors through processes, incentives, plans, and policies (Alvesson & Kärreman, 2004) and is often termed as technocratic control. From this perspective, output control is part of technocratic control. Another way of expressing these two sides of control is made by Beckérus and Edström (1988) as they suggest control by ideas or instructions. Alvesson and Kärreman (2004) propose several methods for normative control in their study of an accounting firm. These methods all boil down to what is perceived as "good behavior" and norms in the organization. They show that these norms and cultural aspects often intertwine with technocratic control methods (e.g., process for career advancement reinforcing organizational culture and ideology). Furthermore, they suggest that these normative controls influence both organizational and individual levels through shaping professional identities.

Most change management research does not situate itself precisely in the field of organizational control. However, there is some knowledge on the impact of control during change and enabling forms of control. Traditional forms of control leaning on coercive methods can stifle innovation and limit change (Cardinal et al., 2017). However, formal and direct practices of control need not equate to coercive practices (Alder & Borys, 1996). Research on controlled and formalized innovation processes found bureaucratic practices to be enabling or coercive depending on how the formal system was designed and implemented (Jørgensen & Messner, 2009). Similarly, Alder and Borys (1996) found that direct control resulted in positive attitudes among organizational members when the primary focus was not on compliance, rather when control supported them to master their tasks better. From a less coercive

perspective, normative control aids in creating shared meaning that necessitates decreased focus on hierarchy and explicit rule-governed procedure (Sewell, 1998). Cardinal et al. (2017) find that in the 21st century, studies on organizational control are to a higher degree taking informal practices into consideration and look at enabling forms of control. For instance, Alvesson and Kärreman (2004) describe control as a way to "secure sufficient resources and mobilize and orchestrate individual or collective action"(p.424). Here, control is the method to align work towards achieving the common goals and ensuring that the means to execute the work is present. However, Alder and Borys (1996) suggest that the distinction between enabling and coercive is not about the type of control lever that is used – as already mentioned informal/formal and normative/technocratic. Instead, they suggest that control is found to be enabling when there is alignment between organizational objectives and employee goals. In such situations, organizational members labelled control methods as "good" (ibid).

Furthermore, Cardinal et al. (2017) suggest that scholars and practitioners need to adapt their views and methods of organizational control to a contemporary business environment. Traditional modes of control has been shown to be unsuitable in environments with fast changes and high uncertainty (Alvesson & Lindkvist, 1993). Instead, normative control through corporate culture is suggested to be the way to regulate organizational activity under such circumstances (Alvesson & Lindkvist, 1993; Ouchi, 1980). However, there is a need for a balanced mix of control levers, and this balancing act is not only temporal but also situational (Cardinal et al., 2004).

This dissertation focuses on behavior control mechanisms and does not deal with output control (Ouchi & Maguire, 1975) to any substantial degree. The appended papers do not contain deeper insights or data points on output control. As this research looks at change, I argue that focusing on behavior control makes sense as these control mechanisms are forward looking, in a manner similar to change. Output control, on the other hand, is evaluating past events. Behaviour control mechanisms, in the case of this dissertation, can be both normative and technocratic (Alvesson & Kärreman, 2004). Figure 1 presents an overview of concepts in the theory of organizational control.

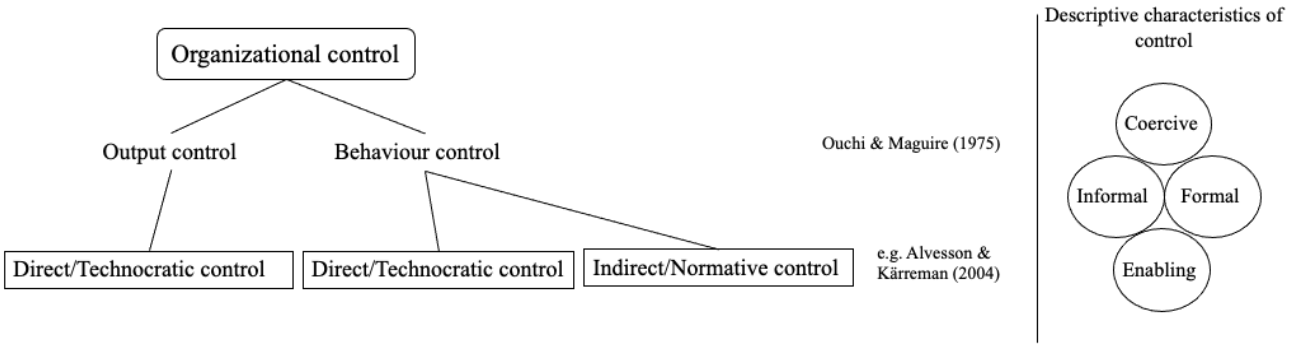

Figure 1 - Overview of concepts in the theory of organizational control. In this dissertation, behaviour control with its two components is in focus.

2.3 Trust

There is an agreement in research that trust plays a vital role in organizations. Authors have established that organizational members' trust in change, leaders and change agents, influence the ability to change successfully (Choi, 2011; Lines et al., 2005; Oreg et al., 2011; Whitener et al., 1998). Trust is also important in organizations as it facilitates communication and coordination (McAllister, 1995), plays a role in motivation (Amabile & Kramer, 2011), and supports creativity (Brattström et al., 2012). Furthermore, trust is found to improve performance both in tasks (Lines et al., 2005) and the bottom line

(Covey & Conant, 2016). During the past decade, trust in society has been under siege as trust levels in our major institutions (including businesses) has decreased steadily (Edelman, 2021, 2022). Research suggests that organizations get stuck in cynicism and to the detriment of both organizational members and the business performance, distrust becomes the normality (Zaki, 2022). Thus, organizations face challenges in preserving and creating trust in the business environment today but the need for trust in organizations is evident.

Definitions of trust are plentiful, with the key notion that the trustor (i.e. the person trusting another party) is exposed to vulnerability and risk of opportunism. Mayer et al. (1995, p. 712) suggest that trust is "the willingness of a party to be vulnerable to the actions of another party based on the expectation that the other will perform a particular action important to the trustor, irrespective of the ability to monitor or control that other party". This definition will be used as inspiration for discussing trust in this dissertation as it captures the emotional realm and the choice to trust. In fact, trust has three different constituent parts: an aspect of belief, a decision, and a resulting action (Dietz & Hartog, 2006).

In previous research, there are three different traditions guiding our views of how trust is formed. Möllering (2006) condenses these to trust as reason, routine, and reflexivity.

- Trust as reason – something we build by reason and logic.
- Trust as routine – a feeling built over time and expectation.
- Trust as reflexivity – trust as a process.

A reflection on these three could be where affection and emotion are involved. Some argue that affection is a lens that influences our reasoning when determining a person's trustworthiness (Jones, 1996). While others suggest that there are different types of trust, for example: calculus-based trust and affect-based trust (Rousseau et al., 1998) or similarly, cognition-based trust and affect-based trust (McAllister, 1995). However, as suggested by Möllering (2006), rationality and emotion is a duality that we cannot escape, and both sides are part of our reasoning. In addition, Möllering (2006) suggests that an element of trust is missing in these three bases and much of the existing literature, namely the leap of faith. In fact, Möllering (2006) argues that this leap of faith or suspension connects the three bases of trust. In research on trust there are several suggestions on the different types of trust based on how it is developed or how trustworthiness is judged. Table 3 lists the contributions of different authors and relate to Möllering's (2006) conceptual framework for trust:

Table 3 - Overview of trust concepts in previous literature

Reason	**Routine**	**Reflexivity**
Deterrence-based trust is developed through high penalty/sanction in case of violation and by that assures that the trustee will be trustworthy (Rousseau et al., 1998).	*Knowledge-based* trust develops from positive confidence based on earlier experience and connects to the predictability of the person being trusted (Dietz & Hartog, 2006).	In the *process view*, trust is suggested to emerge through cooperation and work to develop trust (e.g. Nooteboom, 1996).
Calculus-based trust is based on rational choice and credible information as the basis and is limited to a specific exchange (Rousseau et al., 1998).	*Institution-based* trust is created around a certain amount of control and/or legal mechanisms and is also connected to predictability – that people will act as expected (Rousseau et al., 1998).	Trustors do not sit back and wait for trust to emerge but need to work on developing trust through a *continuous process* (Möllering, 2006).

Relational trust is based on repeated and continuous situations and is robust against minor violations (Rousseau et al., 1998). This is also referred to as *affect-based* trust (McAllister, 1995).		

In this dissertation, the focus is not how trust comes about or the specificities of the trustor and trustee. Instead, the discussion centers around the consequences of trust (existence or absence thereof) during organizational change and the role of trust in supporting change agency. I acknowledge, in agreement with Möllering (2006), that empirically trust depends on all the trust bases and that it is not clear in a situation exactly how trust is formed by the different bases of trust. Nonetheless, it is important to understand trust and its formation; therefore, trustworthiness is introduced next.

Trustworthiness is connected to trust. The trustor develops trusts for a person that holds some aspect of trustworthiness (Mayer et al., 1995). By assessing a person's trustworthiness, the trustor can develop trust. Three characteristics determine trustworthiness, namely ability, benevolence, and integrity (ibid). Ability denotes the skills, competencies, and characteristics the trustee possesses. Benevolence captures the extent to which the trustee has good intentions. Integrity relates to the extent the trustee abides by principles or norms that are acceptable to the trustor. These three aspects of trustworthiness are situational and context specific. However, trust is not always developed on a person-to-person basis in an organization. Organizational members can base their trust in the management based on the feeling of being trusted or distrusted by leaders (Lines et al., 2005). Managers' behaviors and actions influence the level of trust that is placed in them even though organizational members may not have direct contact with managers (Whitener et al., 1998). Furthermore, due to the organizational distance, other control mechanisms play an important role in how trust in management is created, such as processes, structures, and culture (Lines et al., 2005; Whitener et al., 1998). These organizational aspects indicate the management's trust or distrust in employees as an alternative to personal interaction (Lines et al., 2005). Furthermore, these control factors are enablers of managers' trustworthy behaviors (Whitener et al., 1998). Trustworthy behavior is linked to five characteristics (1) behavioral consistency, (2) behavioral integrity, (3) sharing and delegation of control, (4) communication, and (5) demonstration of concern (ibid). The outcome of change efforts and events can also influence trust in the management (Lines et al., 2005). Perceived negative events and uncertainty harm trust whilst positive events, decisions, and honest information can sustain or increase trust.

2.4 Organizational change through involvement

Beer and Nohria (2000) suggest two logics in organizational change. On the one hand, top-down planned change operates to a large extent by output control, and the organizational members are the change recipients incentivized by monetary rewards. On the other hand, change focused on building organizational capability by involving more members where the process can evolve along the way (Beer & Nohria, 2000). In this dissertation focus is on change closer the latter type – change through involvement. Organizations that change do so by the actions and behaviors of everyone in the organization – to some extent everyone is involved (Kahn, 1974; Moran & Brightman, 2000; Senior et al., 2020). Furthermore, the success of change depends on the involvement of organizational members outside the top management team (Lines, 2004).

Employee involvement entails many different practices and is not necessarily regarding organizational change. Several expressions are closely connected or overlap each other, such as participation, decision making, consultation, influence sharing, and empowerment (Morgan & Zeffane, 2003). In fact, employee involvement does not have a broadly accepted definition or construction even though it is a concept with research dating back to the beginning of the 20th century (Glew et al., 1995). Co-determination and industrial democracy – indirect and direct participation (Rubenowitz et al., 1983; Stymne, 1986) – was once the focus of research on involvement. In these perspectives, involvement focused on if and how non-managerial staff could participate in decision making. Indirect participation schemes (e.g., union representatives as part of decision making) has emerged as a common practice or law in Europe during the 20th century. However, Rubenowitz et al. (1983) find that direct participation has a greater positive effect than indirect participation on organizational members' commitment, job satisfaction, and attitude towards their company. The focus here is on direct involvement, and there is no emphasis on indirect schemes as they are not part of empirical studies.

Glew et al. (1995, p. 402) defines participation as "a conscious and intended effort by individuals at a higher level in an organization to provide visible extra role or role-expanding opportunities for individuals or groups at a lower level in the organization to have a greater voice in one or more areas of organizational performance". Here, we can observe that participation is a management practice that is discussed in a top-down manner. However, Fenton-O'Creevy (2001, p. 25) defines employee involvement as "the exercise by employees of influence over how their work is organized and carried out". Thus, the latter definition is a broader description of involvement and encompasses not just managers. Interestingly, employee involvement is also described as a quality of the organization rather than specific to any organizational member or their job (Fenton-O'Creevy, 2001). As noted earlier, there is lack of clarity about what employee involvement connotes and there is no consensus on how numerous related concepts overlap. As organizations change so does employees' involvement, and the need to further explore the concept persists (Glew et al., 1995; Morgan & Zeffane, 2003).

The notion of involvement in organizations is not a new concept; however, it contrasts sharply with the view of organizations as machines, which has been dominant during much of 20th century. In 1960, Douglas McGregor first published his seminal work *The Human Side of Enterprise* where he introduces theory Y as a contrast to the bureaucratic management theories of that period. According to McGregor (2006), "The central principle which derives from Theory Y is that of integration: the creation of conditions such that the members of the organization can achieve their own goals *best* by directing their efforts toward the success of the enterprise" (p. 67-68, italics original) and "…integration means working together for the success of the enterprise so we all may share in the resulting rewards" (p.72). McGregor's thoughts resonate with our perspective on organizational members today and what it means to be working together. Even though involvement is a broad concept, scholars agree about its positive impact on organizations in general and change in particular.

Sashkin (1984) provides a useful suggestion on how involvement can be expressed by identifying four types of involvement: setting goals, making decisions, solving problems, and making changes. Referring back to McGregor's (1960) definition of integration as working together for the success of the enterprise, perhaps involvement is best described in the straight forward manner of Sashkin (1984). In this dissertation, I will use involvement as the term and refer to research coined under the umbrella of both involvement and participation. To my mind, involvement connotes a higher degree of agency and influence than the term participation. Furthermore, I draw on Sashkin's way of expressing different forms of involvement where the focus is about involvement in making changes. Furthermore, my view of what involvement connotes is inspired by McGregor's integration.

Involvement is found to be positive in organizations in multiple ways. Involvement increases organizational members' motivation (Huy, 2005), supports creativity (Amabile & Kramer, 2011) innovation, and flexibility at work (Shani et al., 2009). More often, employees involved in creating and driving change are committed to change (Beer, 2009), accept change, and experience positive emotions (Oreg et al., 2011). In addition, employees involved and consulted during change also develop sustained trust, which is a factor for successful change (Morgan & Zeffane, 2003). By involving their employees to a large extent (or large circle of people), organizations can introduce new ways of thinking together (Schein, 1993) by accessing more knowledge (Hautz et al., 2017). Collaborating and creating new ideas (i.e. thinking together) helps organizations to deal with wicked problems, innovate old ways, and reach consensus when there is no clear road ahead (Bushe & Marshak, 2015).

Research suggests that organizational members at all levels spend more time working together in modern organizations (Cross et al., 2016; Edmondson, 2019), and compared to the start of 21st century, 50% more time is currently being spent on collaboration (Cross et al., 2016). At the beginning of the 1990s, Pasmore and Fagans (1992) noted the importance of creating an environment in organizations that support and endorse involvement. Arguably, the need for such an environment persists, as more time is spent on collaboration and change requires increasingly more involved actors.

Degree of involvement

Research describes the degree of involvement in different ways. As Sashkin's (1984) definition suggests, one part of involvement relates to decision making. From the perspective of involvement through decision making, a way to show degree of involvement is to capture the degree of power that is shared. Black and Gregersen (1997) suggest the following continuum from no involvement to a high degree of involvement, as shown below in figure 2.

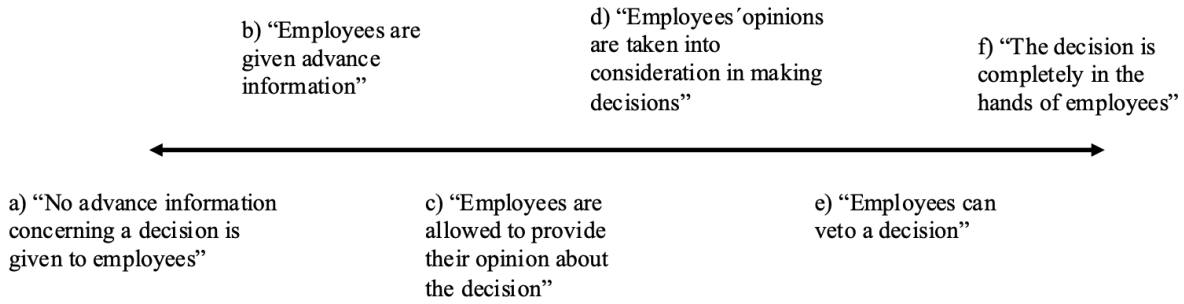

Figure 2 - Continuum of degree of involvement adapted from Black & Gregersen (1997, p862)

This view of involvement relates to managerial control and allowance that enable organizational members to be involved in decision making. However, considering involvement in change (Sashkin, 1984), Pasmore and Fagans (1992) propose that involvement drives change at both organizational and individual levels, and they propose a continuum of involvement ranging from simply joining and being part of an organization to the highest level of designing the change, and thus creating a new version of an organizational system, see figure 3.

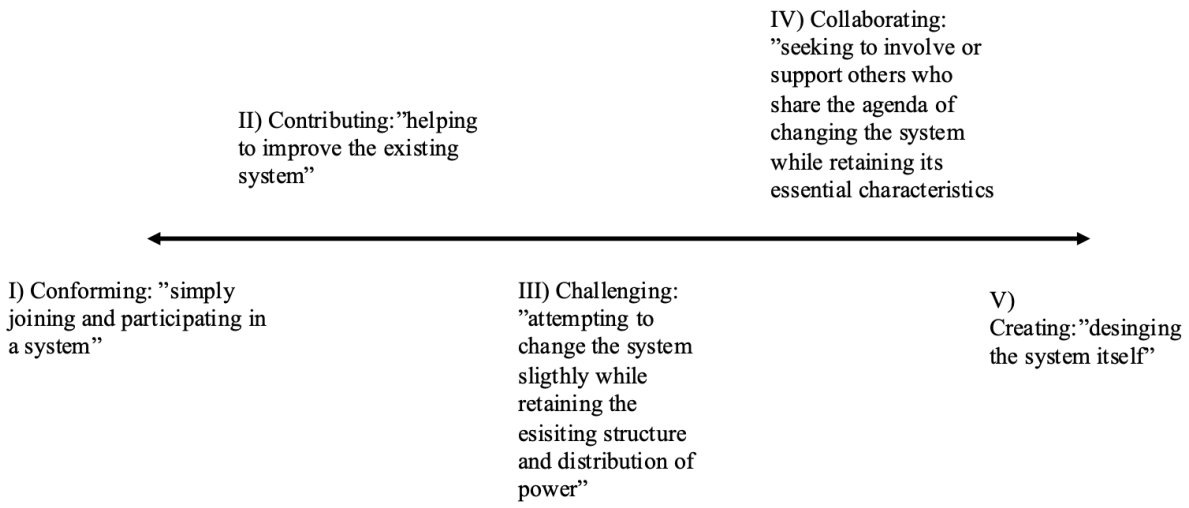

Figure 3 - Continuum of degree of involvement adapted from Pasmore and Fagans (1992. p385)

The authors note that a higher degree of involvement in change leads to a greater possibility of a positive impact on the organization and individual development. However, in most initiatives with employee involvement, the degree of participation allowed by the organization is low and does not open up for particularly big changes (Pasmore & Fagans, 1992).

2.4.1 Change readiness and resistance

As change influences three of the most important drivers of work behavior – purpose, identity, and mastery (Moran & Brightman, 2000) – it is not surprising that organizational members can have strong emotional reactions towards change. If the emotions are negative and organizational members resist change, it will be more challenging to realize the change (Armenakis et al., 1993). However, recent research invites a more multifaceted view of resistance and suggests that it is not all bad (Reed & McDermott, 2020; Thomas & Hardy, 2011). Change readiness is a central concept in research on managing change and no dissertation in the field can go without mentioning it. As such, I will provide a few insights into the fundaments of change readiness and offer a contrasting view. However, readiness and resistance are not the central concepts to this thesis, and I will discuss this in Chapter 5.

Change readiness is defined by Armenakis et al. (1993) as “readiness (…) is reflected in organizational members' beliefs, attitudes, and intentions regarding the extent to which changes are needed and the organization's capacity to successfully make those changes. Readiness is the *cognitive* precursor to the *behaviors* of either resistance to, or support for, a change effort” (p.681–682, italics original). From this definition, we can deduce that change readiness does not equal support for change and it does not equal action. It is an aspect of organizations that make change efforts more likely to succeed (ibid). There are many factors that create change readiness both easily actionable for an organization and some that are difficult to address. Armenakis et al. (1993) suggest a complex system of factors that create change readiness. These factors address individuals, organizational systems, change leaders, and social dynamics. However, a central factor to create change readiness is the message of change that “should incorporate two issues: (a) the need for change, that is, the discrepancy between the desired end-state (which must be appropriate for the organization) and the present state; and, (b) the individual and collective efficacy (i.e., the perceived ability to change) of parties affected by the change effort” (Armenakis et al., 1993, p. 684).

In much of the research on change readiness, resistance is treated as a natural consequence of change and the expected reaction that needs to be combated (Piderit, 2000). Research suggests that not all

reactions that seem averse to change are necessarily change resistance (Reed & McDermott, 2020; Thomas & Hardy, 2011). Most research treats change resistance as something spontaneous that arises as a reaction to change. However, Ford et al. (2008) propose that resistance (and labelling it so) is a form of sensemaking from the perspective of both change leaders and organizational members. Thus, questioning change, discussing and suggesting alternatives can also support change and help to ground it in the organization (Thomas & Hardy, 2011).

2.5 Theoretical conclusion

In the theoretical framework, focus is on change agency and organizational control and trust. Furthermore, insights on management and involvement in change are provided. The following definitions are presented and will be used as the basis for the discussion:

- Organizational members that hold distributed change agency "will seek to innovate, participate in and manage change within and beyond their area of responsibility – they will seek to obtain and exercise "change agency" on behalf of the organization to deliver its strategic goals" (Doyle, 2001, p. 321).
- Organizational control is "the exercise of power (influence) in order to secure sufficient resources, and mobilize and orchestrate individual and collective action towards (more or less) given ends" (Alvesson & Kärreman, 2004, p. 424).
- Trust is "the willingness of a party to be vulnerable to the actions of another party based on the expectation that the other will perform a particular action important to the trustor, irrespective of the ability to monitor or control that other party" (Mayer et al., 1995, p. 712).

Organizational control can also take different forms, namely output control and behavior control (Ouchi & Maguire, 1975), wherein I have examined behavior control, both as normative and technocratic approach (Alvesson & Kärreman, 2004). With regard to trust, it is also important to note that I adhere to Möllering's (2006) view that trust is formed through three bases namely reason, routine, and reflexivity. Furthermore, to a certain extent, these three bases are all involved as trust is formed and connected by an element described as a "leap of faith".

Control and trust have an interesting tension. The two constructs can co-exist and support each other but could also be negative in relation. Control mechanisms can undermine or hinder trust if a structure is too rigid (Rousseau et al., 1998; Schoorman et al., 2007). Controls can then be viewed as the source for trustworthy behavior instead of the trustee (Schoorman et al., 2007). However, trust can be the factor that ensures autonomy can be achieved and managers can abandon strict controls (Bonchek, 2016). Trust can also become part of the normative control structure in, for example, organizations as clans (Adler, 2001; Ouchi, 1980). Furthermore, there is a link to trust in the tension between change and stability (Leana & Barry, 2000). Trust is crucial for successful change; however, at the same time, people develop trust through predictability and social ties, features more available in a stable organization (Brattström et al., 2012; Leana & Barry, 2000). However, in innovation processes, trust is a mediating factor between rigidity of systematic processes and the freedom to be creative (Brattström et al., 2012).

Involvement in change is a starting point for the research in this dissertation as change here focuses on getting more organizational members involved. Thus, involvement is also a central concept in the theoretical chapter. I base my view of involvement on Sashkin's (1984) suggestion that there are four fundamental forms of involvement, and I pick one form, namely involvement in change. Furthermore, my view of involvement is inspired by McGregor's (2006) term integration – "working together for the success of the enterprise so we all may share in the resulting rewards" (p.72). Previous research has established that employee involvement is beneficial to organizations both from the perspective of change

and in general. Involvement supports motivation (Huy, 2005), creativity (Amabile & Kramer, 2011), innovation, and flexibility at work (Shani et al., 2009). Furthermore, involvement can support development of trust (Morgan & Zeffane, 2003). Thus, there is also a link between involvement and trust. In addition, if involvement is included in the organizational setup, such as processes or norms, arguably involvement is also part of the organizational control structures.

3 Methodology

The following chapter focuses on the methods used in the four appended papers. As each paper describes the method specific for the project and paper, this chapter expands on the overall research approach and the methods used.

3.1 Research approach

The research for this dissertation was conducted over a five-year period starting mid-2017 with the last empirical work concluded in February 2022. The four appended papers are based on four different studies. A clear practical phenomenon that forms the basis for my research has been identified by both scholars and practitioners. Although organizational change has been a topic for research over decades, managing change is challenging and many endeavors have failed (e.g. Beer & Nohria, 2000). Furthermore, the context with increasingly rapid and continuous change (Horney et al., 2010; Mankins & Gottfredson, 2022; Pasmore & Woodman, 2017; Pregmark, 2022) requires organizations to manage change in new ways (Pregmark, 2022; Worley & Mohrman, 2016). With complex and rapid change, organizations need to involve more organizational members in change, and distributed change agency is required (Caldwell, 2003.). The same image has been conveyed in the conversations and collaborations underpinning my research. Most practitioners I met expressed that managing change is really tricky and their organizations need to improve to get people onboard. Many articulated that the context for most is dominated by the increased pace of change.

All four studies attempted to explore how changing organizations can improve and be prepared for managing change, specifically, from the perspective of driving change with more organizational members involved. Although there is a strong theoretical motivation for this dissertation, I did not start with a focus on bridging a theoretical gap but instead add insight to a phenomenon. Authors such as von Krogh et al. (2012) and Schwarz and Stensaker (2014) focus on the need for research with a starting point in practice. Phenomenon-based research encourages us to understand problems using theory from different fields and this is the strength of such research (Bansal et al., 2018; Eisenhardt & Graebner, 2007). To frame my research, I developed my research questions centered on distributed change agency (e.g. Caldwell, 2003, 2005, 2006) and adopted a theoretical framework around trust (e.g. Rousseau et al., 1998) and organizational control (e.g. Alvesson & Kärreman, 2004; Cardinal et al., 2004).

My approach to writing the doctoral thesis is based on systematic combining in an abductive approach (Dubois & Gadde, 2002). That is, I moved between theory and empirics to inform my analysis and the resultant discussion. This way of working is a natural outcome of my doctoral studies where each study and resulting paper provided clues and raised further questions. Abductive reasoning has been used both while working on each paper and research education in its entirety. Within the studies I started with a theoretical basis and quickly moved to data collection, simultaneously consulting and building on my theoretical understanding. Each study informs my work in the next study, and as the processes often overlapped, I have been looping between studies and theory continuously. Figure 4 shows a timeline of the four papers with some ensuing reflections informed on this doctoral thesis.

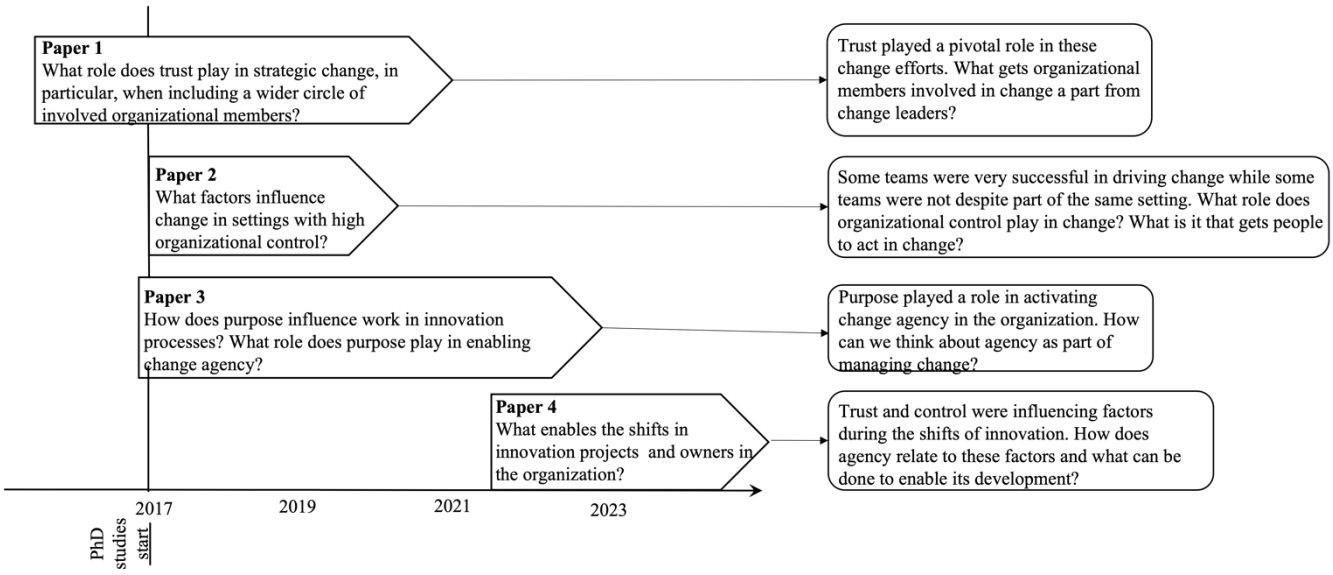

Figure 4 - Schematic timeline over my doctoral studies and how each paper relates to the thesis.

All four studies include elements of trust and organizational control and have contributed to my understanding on how the two concepts play a part in managing change and enabling change agency. I have continuously iterated and synthesized my work to conclude this thesis. The starting point for all four studies is grounded in the phenomenon and aims to explore the management of changing organizations. Paper 1 - *Strategy workshops with wider participation: trust as enabler* – focusing on trust in strategic change when inviting a wider circle of participants. This study shows the importance of trust for organizational change and has inspired me to focus on how change can be managed when more organizational members are involved. Paper 2 – *Change in tightly coupled systems: the role and actions of middle managers* – relates to change in organizations characterized as tightly coupled systems (TCS) (Burke, 2014). These organizations have extensive organizational controls in place (implicit and explicit) and are designed to produce the same result across all units. However, in this study, we perceived substantial differences between different teams and found three mechanisms underlying these differences. This study raised more questions about organizational control and what inspires people to act in change. In paper 3 – *Learning from collaborative action research in three organizations: How purpose activates change agency* – we collaborated with three organizations on how purpose could be used in innovation projects. In this study we identified an interesting influence on change agency and this got me reflecting on how agency could be part of managing change. In paper 4 – *Take the Leap: Developing Change Agency for Innovation* – I focused on the shifts an innovation project goes through as the phase and project owner changes to learn about what enabled or hindered innovation to be successfully run. The interviewees raised many challenges and several success factors, many relating to trust and control. This study has deepened my interest in trust and control further, specifically in connection to change agency. A major conclusion of this timeline and development of my studies is that I did not start with one question and adhered to it for the entire duration. However, I have been able to build my knowledge and focus continuously, thus reaching the results of my research included in this dissertation. For more details about each paper and their relationship to my research questions, refer to chapter 4.

With regard to ontology and epistemology, I lean on a relativistic and interpretivist view (Guba & Lincoln, 1994). This implies that what I study exist in relation to its context – made up of organization, society, and organizational members. In contrast to a realist and positivist perspective (Reed, 2005), I do not think we can study one reality and expect to obtain objective data. To me a relativistic and

interpretivist view has meant that it is important to understand a broader context of what drives change in organizations today and to some degree the internal environment of my case companies and collaboration partners. This is the backdrop for the ongoing change and influences their actions and reactions as organizations. I do not intend to find a universal model or definitive answer as I do not believe they exist in my field of research. Instead, I examined change agency in changing organizations with the expectation of adding knowledge to the field of organizational change and development.

I have also reflected on my reason for doing research during the doctoral undertaking. There is an ongoing discussion in academia about the motivation for doing research and for whom this research would be useful. Some scholars question the usefulness of academic research and indicate a gap between practice and research (Mohrman & Lawler, 2011; Sharma & Bansal, 2020; Starkey & Madan, 2001; Van de Ven, 2007). What constitutes useful research can be debated. Mohrman and Lawler (2011) discuss useful and dual-impact research, meaning impact on theory and practice. According to the authors, research must have a dual impact as organizations are essential to shaping the future, and thus has substantial impact on the quality of life and health of communities. Useful research must be conducted in close collaboration with practitioners to understand the practical every day (Mohrman & Lawler, 2011). This perspective of usefulness is shared with the action research paradigm. Action research is an approach where the value of research is the result of both the created action and practical knowledge (Coghlan & Shani, 2014). Furthermore, from the perspective of engaged scholarship, Van de Ven (2007) suggests that scientific knowledge and practical knowledge are two distinct forms that are complementary to understanding our reality. The two must be viewed and created in close connection to avoid creating biased or partial knowledge (ibid). These views on useful research have been influential during my doctoral studies and, arguably, concurs with phenomenon-driven research. I have attempted to create useful research (Mohrman & Lawler, 2011; Van de Ven, 2007) by discussing practical and scientific knowledge and contributing to both realms. I believe it is important to keep this in mind when reading my dissertation.

3.2 Qualitative research

My research is qualitative in nature. Thus, the empirical data are descriptive and based on spoken and written accounts, reflections, and observations of events (Bryman & Bell, 2007). Qualitative research is suitable for explanatory studies as it facilitates an in-depth examination to provide insights (Ritchie, 2013). Qualitative methods are also useful for ongoing phenomena (Flick, 2014), as is the case for all the studies included here. To explore change agency in changing organizations, the four studies are concerned with understanding what ensues in these organizations during change, what creates actions, why and how certain events take place or certain reactions occur (from organizational members or the organization as a collective). In studies such as these, quantitative methods do not provide adequate answers as these methods are primarily useful for uncovering correlations and influence among variables. The potential to access rich descriptions of events, reactions, and emotions has been the key for understanding the circumstances of change in these studies. The research questions aim to explain more than an effect or relationship between concepts. Rather, the aim of this doctoral thesis is to answer questions of how, and for this reason, qualitative methods seem suitable.

There is a multitude of different study designs in qualitative research. The four papers included in this dissertation are of two types, case study (Eisenhardt, 1989b; Yin, 1994) and action research (Schein, 1987a; Shani et al., 2004). Papers 1 and 3 are action research studies while Papers 2 and 4 are case studies. In papers 1 and 3, I was primarily active from the data analysis process to completed paper. In papers 2 and 4, I was involved from ideation to finished paper. Regarding paper 1, design and empirical

research was performed prior to my research education started. The empirical work was designed and performed by a close colleague and I was engaged in discussing the research continuously.

3.2.1 Action research and collaborative methods

Shani et al. (2004, pp. 83-84) define action research as "an emergent inquiry process embedded in partnership between researchers and organizational members for the purpose of addressing an organizational issue (or problem) and simultaneously generate scientific knowledge". Action research is a tradition in the broad category of collaborative research. These methods focus on creating actionable and scientific knowledge through close collaboration/partnership between the researcher and organization. Action research was first mentioned in the 1940s and is considered as the beginning of collaborative research methods (Shani et al., 2004). Central to action research is close collaboration between scholars and practitioners. A major difference with much non-collaborative methods is the focus on real issues in organizations that provide an opportunity for both theoretical and practical learning (Coghlan, 2011). Furthermore, an action research approach allows for an iterative research process where collecting data, analyzing, planning, creating action, and evaluating can be looped multiple times (Bryman & Bell, 2007; Schein, 1987a). Thus, using action research methods allows the research project to test the analysis and draw further conclusions on the findings during the ongoing study. The term action research is generic and can refer to a multitude of methods (Shani et al., 2004). I believe the fundamental idea is about focusing on real problems and learning collaboratively with practitioners to create actionable knowledge. I will summarize the methods used in the two studies included here (papers 1 and 3) and discuss some of ethical aspects of action research. For details on the data collection methods used in the action research studies refer to Chapter 3.3.

Action research was a useful approach for papers 1 and 3. Both studies explore change as it unfolds, and the action research methods enabled researchers to collect first-hand accounts and witness reactions as they happened and simultaneously create practical and academic knowledge (Coghlan & Shani, 2014). The collaborations and actions were different in both studies. In paper 1, the focus is strategy creation workshops where management teams (top- and middle-management) invited participants from the organization to input or co-create the strategy. Totally, ten strategy creation processes formed the study. One of the authors (i.e., Pregmark, E. J.), who also moderated the workshops, designed the workshop structure in collaboration with the organization. In paper 3, the research team collaborated with three organizations on how purpose played a role during innovations processes and how it influenced change agency. In this study, even though the research team worked with each organization separately, it provided learning and reflection across all these organizations. The research team collaborated with the involved organizations and designed the structure for joint and separate learning. Furthermore, these researchers coordinated, collaborated, and supported organizations during the projects.

Ethical considerations

An action researcher's role is twofold: help the involved organization to resolve their concerns and contribute towards academic research (Coghlan & Brannick, 2001). This dual role can be perceived as challenging, especially from a positivistic perspective where a researcher should remain aloof and objective with the studied objects (i.e., organizational members). However, the traditional view of research ethics is not suitable for action research methods (Fredberg & Pregmark, 2023). In collaborative research, it is not possible to remain distant to the research or indifferent to the outcomes of the intervention. Arguably, it would not be methodologically possible. The underlying objective is to engage with collaborators (i.e. involved or opposite of remaining aloof or distant) to investigate and resolve real organizational situations to effect change while creating theoretical knowledge (Coghlan, 2011).

Fredberg and Pregmark (2023) suggest three important topics to consider when assessing action research from an ethical perspective – intention, capability, and openness. The intentional aspect is central to collaborative methods and action research. A researcher need to be helpful to the organization(s) where she/he is active and firmly believe that interventions and unfolding changes are beneficial to the organization (Fredberg & Pregmark, 2023; Hilsen, 2006; Schein, 1987a). This notion is also central to my view of ethical demands as an action researcher. As an action researcher I should never collaborate and support an action unless I firmly believe it would benefit the organization. However, it is easier said than done in some situations. Consider for example a change that is positive for the organization overall but negative for a specific team. Should you then do what is good for the organization but negative for a smaller group of individuals? It is not so clear-cut where your responsibility lies for being helpful. In the studies for papers 1 and 3, there were never any dilemma of this sort; however, the intent of doing good was always part of the discussion held in the research team.

With regards to capability, Fredberg and Pregmark (2023) discuss both organizational capability to handle the introduced action and a researcher's competence to handle unintended consequences. To engage in the collaboration and understand the organization is important to be able to have a feeling for what actions and consequences that could be above an organization's capacity. Consistent with doing good, as researchers, we must be able to pause and assess the situation as it unfolds and together with the organization judge the best way forward. However, as Fredberg and Pregmark (2023) note, the decision on what to do is normally with the organization's management and researchers can only suggest and recommend. With regard to my own ability to handle situations that unfolded during my studies, I am glad that I never did a solo project as an action researcher. In fact, I have always worked in a research team involved in collaborative studies. The ethical question regarding my own competence felt less concerning as my knowledge and experience improved during these years, and being able to discuss and get support from the research team has been invaluable.

Examining openness, informed consent from participants is essential for conducting ethical research. In studies where the lines between one's role as a researcher and an organizational member/external consultant might seem blurred this can be tricky, such as insider action research studies (Coghlan & Brannick, 2001). Declaring one's role and purpose as researcher is probably needed continuously during collaborative studies where you become a familiar face in an organization. In the studies for papers 1 and 3, I was not part of the empirical work (although, collecting supporting data in paper 3). However, in a couple of other action research studies that are yet to materialize as publishable papers, I did reflect on my role and the need for wearing my "researcher hat". During such reflections, I moved beyond the topic of informed consent and focused on handling the rich data obtained from collaborative research. In establishing rapport with individuals in an organization, very often action researchers will hear and see more. The strength of these methods is such that they provide a deeper understanding of the phenomena. However, a researcher must honor the organization and its members' trust and faith. In my experience you will learn about issues in the informal talks you can have as an action researcher that should not be put as a quote in your paper. The data can be a range of things from a harsh critique of a colleague or a personal comment made in confidence. These data snippets can inform about the overall understanding within the organization, but I believe it should stop at that. Researchers should always reflect on how or when to treat data with delicacy. Also, in interview situations (collaborative designs or pure interview studies) I have felt that this is important. There is no unclarity on the researcher's role or informed consent when interviewing, but on the question "can I say something off the record?" I usually refuse. I feel that it unnecessarily makes on- and off the record indistinct and diminishes my role as researcher in such a situation.

3.2.2 Case study

Papers 2 and 4 were designed as multi-case studies (Yin, 1994). A multi-case study is suitable for comparative studies or studies where the focus in on general trends (Bryman & Bell, 2007). Furthermore, case studies help researchers to access rich and complex data (Eisenhardt & Graebner, 2007) and are, therefore, appropriate for questions of *what* or *how* (Eisenhardt, 1989b). Thus, case studies were suitable for these studies as they seek to uncover general learnings of which mechanisms are found for realigning units in larger tightly coupled organizations (paper 2), and what enabled or hindered innovation to be successfully run during shifts in the innovation process and organizational owners. In both case studies, data were collected through interviews. Section 3.3 provides more information on data collection.

In Paper 2, three organizations in the retail industry are in focus. All three can be characterized as tightly coupled systems with clearly defined control structures and high interdependence between units and functions (Burke, 2011, 2014), and thus similar in their setup and organizational opportunities. Four business units in each case were selected based on their financial performance and employee engagement, that is, two units above average and two units below average on both indicators. This sampling was done to uncover differences within organizational systems, because theoretically they should be working in a similar manner, producing identical results and having the same opportunities. For the purpose of the study, we interviewed members of both the local units and middle and top management executives. This study made it possible to develop several levels of analysis, which is a common characteristic of case studies (Eisenhardt, 1989b). The researchers could take on several perspectives during the analysis: within organization, within business unit, and between all three organizations. I found this to be the strength of the study and our methodological choice. We obtained rich data and built our understanding of these organizations bottom-up and top-down.

The study in paper 4 is concerned with product innovation processes in established manufacturing firms. The focus is on how innovation moves from one part of the organization to another as the innovation process shifts and, consequently, what hinders or enables this move. Nine different organizations are included in the study, and the sampling was done through a combination of purposeful and snowball sampling (Flick, 2014). The organizations were purposefully selected as they were firmly established in their respective markets and product focused (OEMs or suppliers) as opposed to service or project focused. Subsequently, the interviewees were selected based on the fact that they were working closely with the innovation or in a role that supports organizational transfer of innovations between functions. In some cases, the interviewees were found through snowballing from colleagues that were already interviewed. I have debated if this study should be termed multi-case, given that there are a few cases with only one interviewee; alternately, it could be termed simply as an interview study. However, the aim was to find general and common insights and I compared the perception of the innovation work in these nine organizations. Furthermore, reflecting on section 1.2, it is necessary to understand my research from an organizational perspective and recognize the link between individuals and an organization. Examining paper 4 as a collection of interviews would shift focus to the individual level more than the organizational level. In conclusion, I decided that it is relevant to term the study for paper 4 as a multi-case study.

3.3 Data collection methods

The four studies use different data collection methods, although the use of semi-structured interviews was common for all. Below, table 3 presents the research design, data collection methods, and amount of data. Thereafter, each data collection method is discussed.

Table 4 - Summary of data collection method, research design, and number of data points (by paper).

	Research design and data collection	Number of data points
Paper 1	Action research. Reflection meetings and semi-structured interviews.	28 strategy workshops from a total of ten processes. 22 semi-structured interviews 10 reflection meetings.
Paper 2	Case study. Semi-structured interviews.	46 interviews from a total of three cases
Paper 3	Action research. Workshops (cross-organizations and single), learning journal, semi-structured interviews.	22 semi-structured interviews 3 single org. workshops 6 cross-org. workshops
Paper 4	Case study. Semi-structured interviews.	15 interviews from a total of nine cases

3.3.1 Semi-structured interviews

In all four papers, the interview technique was used to collect data from organizations. Interviewing is a household method for researching organizational change (Langley & Meziani, 2020) as it obtains rich accounts of ongoing events (Eisenhardt & Graebner, 2007). These interviews can be characterized as semi-structured and were planned to some extent, thus enabling the interviewer to adapt as the interview progressed (Bryman and Bell, 2007). Semi-structured interviews have the power to uncover rich data as they facilitate a more dynamic conversation by changing the order of questions and possibly adding follow-up questions. The interview questions were open-ended and did not steer the interviewee, instead, answers could be given based on individual understanding and perspective.

Complementary interviews, as in papers 1 and 3, were helpful as an addition to the bulk of data that were collected through workshops, participants' observations, or group reflections. These interviews provided an opportunity to understand individuals' perspectives on what unfolded during the action research studies. These interviews also offered the potential to verify the ongoing action elements and triangulate (Flick, 2014) the findings.

3.3.2 Action research

In the two action research studies, data were collected from workshops and joint reflections with the involved organizations. My co-authors (Johanna E. Pregmark, Tobias Fredberg, and Björn Frössevi) performed this empirical work. Pregmark (papers 1 and 3) and Fredberg and Frössevi (paper 3) collaborated closely with the practitioners involved in these studies. Jointly, researchers and organizational members, created action and learned together as the projects evolved. Earlier in this chapter, the role of an action researcher and the ethical consideration when using collaborative methods has been discussed. Designing action research studies and being an actor, for example, in workshops (as in paper 1) or joint reflections (as in paper 3) is strongly connected to what has been already presented. In these situations, as a researcher need to keep helpfulness as a top priority and at the core of action research is forming relationships with the members of the collaboration. However, focus of this section is data collection. Robust research rests on data and they must be captured in some way. As already mentioned, the two studies also used semi-structured interviews as a complement and a way to triangulate.

During the collaborative studies, the three researchers collected field notes or learning journals to capture what was achieved and what unfolded in the interactions (workshops, reflection meetings, informal interaction). These observations were aimed at covering the dynamic nature of the projects and

interactions, participants' reactions in relation to the change, and the progress and learnings accrued during the projects. The researchers had to be attentive and flexible in their role as action researchers since the nature of these workshops, meetings, and encounters could be dynamic. The researchers used the field notes to capture what was said or happened and also the emotions and feelings in the room.

A major drawback of observational data is that the findings are based on what the participants choose to share in a group setting. What individuals share in a group could be different from what they would share in one-to-one settings. Thus, the data may not capture what individuals think and feel if they do not show or say it. However, the strength of action research and close collaborations in such research, is that as a researcher you gain a deeper understanding of the phenomena and the organization. There is also the opportunity to collect first-hand data of the created actions and reactions that would be difficult in other methods. Furthermore, supplementary interviews were performed during both studies to understand the ongoing projects and changes and for collecting rich data. Interviews are a well-established practice to this end (Flick, 2014).

3.4 Research quality

Traditional perspectives on research quality are developed for quantitative research methods; however, in most cases they are not relevant for qualitative research (Krefting, 1991). The most common way to discuss rigor from this perspective is reliability, replication, and validity (Bryman & Bell, 2007). However, there is an ongoing debate regarding the applicability of these aspects for qualitative methods. Instead, trustworthiness is suggested as the basis for assessing rigor in qualitative research (Krefting, 1991; Lincoln & Guba, 1985). Factors that are grounded in trustworthiness and seem suitable for qualitative research are credibility, transferability, dependability, and confirmability (Lincoln & Guba, 1985).

Credibility (Lincoln & Guba, 1985) or truth value (Krefting, 1991) connects to if the research is believable or not. The credibility of a study establishes if the researcher is confident in the truthfulness of the findings in connection with the research design, context, and informants (Krefting, 1991). One way to develop credibility in a study is to assess the amount of time spent in the field, sometimes called prolonged engagement (Lincoln & Guba, 1985). Awareness, and rising above one's presumptions are also as important as detecting and being open about distortions in the data. During my doctoral research, I strived to create credible research through consciously reflecting on and questioning my assumptions and methods. I made notes during my studies and discussed my work continuously with my colleagues. Furthermore, in collaborative studies a lot of time is spent in the field as the research is based on continuous interactions.

Transferability is to check if it is possible to generalize and apply the research in other contexts (Krefting, 1991). From one perspective, transferability is not relevant for qualitative research because, by design, such studies deep dive into a limited scope (Krefting, 1991). However, knowledge creation is about finding insights that are useful in a general sense and not only for the studied context. Lincoln and Guba (1985) suggest that transferability is in place when there is a fit between the insights and other contexts. To assess this, the research needs to be descriptive enough to allow those that want to transfer the knowledge to assess if a fit can be found (Lincoln & Guba, 1985). This thesis is based on four studies, and their similarities are in focus for the discussion and contributions made. Each paper has a detailed methodology section and description of cases. Furthermore, allowing the empirical data speak through examples is one strategy for making the context in my discussion more apparent. I believe that my conclusions and suggestions are detailed enough to assess suitability in other contexts. I am not imprudent to claim that my research is readily transferable to every possible context; however, I believe that it invites continued exploration of these topics in other environments.

Dependability links to the research design and methodology (Lincoln & Guba, 1985) and relates to reliability of the research. In quantitative research, this concerns if the study can be repeated with the same result. In qualitative studies, Krefting (1991) notes that replication is less relevant as field studies inherently encounter unexpected events. I have strived for transparency in my research by providing detailed descriptions of the research design, methods, and data analysis. The methods are tried and tested in numerous other studies by other scholars.

Confirmability is an aspect closely linked to objectivity. Scientific distance – not being influenced by the subject or in turn influence the subject – is often seen as an important aspect of objectivity (Krefting, 1991). However, in qualitative studies, the value of the findings is amplified through closing some of the distance between the researcher and informants. I believe that no researcher can be fully objective, however, we need to be aware of our biases and perspectives that could influence our research. Furthermore, by working in a research team that discusses studies continuously, confirmability is supported since analysis and data collection are viewed through the lens of several perspectives instead of only one. The research team can jointly scrutinize how we interpret our findings and how we may influence the research process.

Action research needs special mention on the topic of research quality. It is never objective nor aims to be (Coghlan & Shani, 2014; Schein, 1987a). The idea is to be close and collaborate – to take action and influence the subject (i.e., collaborators). Action researchers have an important goal of helping the studied organization, other than doing research and creating knowledge. One needs to believe that the suggested action will be positive and helpful in the given situation (Schein, 1987a). It is not an experiment where testing anything interesting is viable. Therefore, to be able helpful, action researchers must be well informed, about both the organization and theory, which arguably supports research quality. I referred to the rigor of my research in previous paragraphs. However, my intent is to highlight the unique position of action research to produce both rigorous and useful research (Mohrman & Lawler, 2011; Van de Ven, 2007).

4 Appended papers and insights from empirical studies

The four papers included in the dissertation provide input for the research and two settings in different ways. See section 4.1 for an overview of how each paper relates to my research questions. In this chapter, each paper's abstract can be found and a summary of the main takeaways relevant for the dissertation kappa are presented.

Paper 1

Pregmark, J. E. & Berggren, R. (2021). Strategy workshops with wider participation: trust as enabler. *Management Decision,* 59**,** 586-603.

Author's role in the paper: This is a collaborative work where the Johanna E. Pregmark and Rita Berggren contributed equally to analysis and writing. Johanna E Pregmark contributed solely to data collection and research design.

Abstract

Purpose – Wider participation from outside the top management team can support strategy creation and execution in firms by improving access to knowledge, increasing innovativeness, and creating legitimacy for the strategy. However, creating a climate of trust, where ideas are freely expressed and challenged, is easier said than done. This paper focuses on trust in strategizing, specifically in strategy workshops with wider participation.

Design/methodology/approach – The analysis is based on qualitative data from 10 strategy-making processes comprising a total of 28 strategy workshops. Data were collected through interviews and joint reflections with leaders, external facilitators and consultants, and through action research.

Findings – This study identifies three factors that influence trust in strategy workshops with wider participation, namely opening the conversation, providing clarity on the participative process, and delivering with honest intent. These factors could play a crucial role in creating the trust required for wider participation in strategy workshops.

Practical implications – This paper provides strategy actors (e.g., leaders, consultants) actionable knowledge about what strategy workshops with a wider circle of participants require to create trust.

Originality/value – This study relates to the ongoing and increased interest in openness for strategy-as-practice in general and open strategy in particular. Moreover, it contributes to the discussion that the boundaries between strategizing and change tend to become blurred. Therefore, the present paper contributes to the theory and practice of strategy creation, strategy execution, and change by investigating wider participation in strategy workshops.

Main insights for dissertation

- In the studied workshops, trust is an important factor to facilitate change
- Through workshops with wider participation, more knowledge is accessed and change is supported or makes it possible to develop changes further
- Taking measures for the quality of conversations made a difference, as illustrated by the reflection of one interviewee: "Just by being aware of principles for conversations I realize that

we didn't have any real thinking together at all before. What we had didn't have the potential to build new ideas" (Head of Department, Gedea)

- Change does not always have the intended outcomes. The introduction of new ways of working provided better results when the message for change and expectations were clear.

Paper 2

Berggren, R., Pregmark, J. E., Fredberg, T. & Frössevi, B. (2020). Change in Tightly Coupled Systems: The Role and Actions of Middle Managers. *In:* Noumair, D. A. & Shani, A. B. (eds.) *Research in Organizational Change and Development.* Emerald Publishing Limited.

Author's role in the paper: All four authors collaborated in writing this paper. Data gathering was mainly done by Rita Berggren with help from other team members (Clara Strömbeck and Lisa Nyhav). Analysis was mostly done by Rita Berggren

Abstract

The literature on organizational change has long acknowledged the need to balance stability and economic efficiency with the need to be flexible and to change. Authors, certainly in the dynamic capabilities tradition but also in other perspectives, have stressed the importance of more open and loosely coupled systems to promote adaption. However, many organizations do not operate on such premises but rather rely on creating efficient business units through tight coupling, building strict social and administrative control, and jointly relying on common systems. In this study, we conduct 46 interviews with employees from three different retail organizations to investigate how units in such tightly coupled systems change within the framework of the set standards. Through contrasting the characteristics of high and low functioning units, we identify three mechanisms that seem to enable the units to successfully and repeatedly realign and establish new configurations. We conclude that the orchestrator of all three realignment mechanisms is the middle manager, and we discuss the middle manager's role and the different activities that enable a successful realignment.

Addition beyond the information in the paper

It is mentioned that all three organizations are "working to realign in accordance with current transformation work" (p. 189). To provide some more useful context for this dissertation, two out of the three organizations had recently gone from regulated to deregulated markets leading to strong competition and rapid changes. All three organizations experienced technological shifts leading to changes in their work processes and interactions with customers.

Main insights for dissertation

- The three cases studied are characterized by high organizational control due to tightly coupled systems resulting in both formal and informal control structures
- Tightly coupled systems are not investigated in previous research to the same extent as loosely coupled with regard to managing change
- In this high control environment, we see realignment (rather than rapid changes) to new strategies and business demands
- The realignment mechanisms found in this study seem to support the creation of agency. Community support, attachment to autonomy, activity to purpose all work in different ways to

support organizational members in accepting, understanding, and acting on the changes they encounter.
- Control is not experienced as an obstacle for change in the high functioning units, there is freedom to act within the set frames
- Middle managers are found to play a central role to support the organization in the change work – managers orchestrate the suggested realignment mechanism

Paper 3

Pregmark, J.E., Fredberg, T., Berggren, R. & Frössevi, B. (forthcoming) Learning from collaborative action research in three organizations: How purpose activates change agency. *Accepted for publication in Journal of Applied Behavioral Science*

Author's role in the paper: Johanna E. Pregmark, Tobias Fredberg, and Björn Frössevi were mainly involved in the research design and empirical work. Rita Berggren subsequently collected supporting data. Johanna E. Pregmark, Tobias Fredberg, and Rita Berggren developed the paper through analysis and writing.

Abstract

Based on a collaborative study spanning over two years, this paper focuses on purpose as an enabler for change agents as they attempt to introduce new concepts in the organization and, therefore, must handle the ambidexterity problem. We followed three organizations in the process as they attempted to actively use purpose to motivate and negotiate the change initiative. Data were gathered through a larger set of interviews and through collaborative inquiry workshops, separately within the organizations and involving all three. We contribute to the literature by discussing five ways how purpose may activate change agency, something that we believe may often occur, but which has not yet been analyzed. Further, we suggest that the activation of distributed change agency can support the management of contextual ambidexterity. The paper suggests how other organizations could make use of the acquired knowledge, both from the study and collaborative inquiry process.

Main insights for dissertation

- Organizational purpose was introduced to create alignment and unity in the innovation projects, however, simultaneously allow freedom to create without a top-down directive. These projects were a way of developing contextual ambidexterity in the organizations.
- Purpose was found to support the development of change agency among members of the project teams and other organizational members, as one team indicates that the purpose supported diffusion in the larger organization.
- Purpose supported the development of agency through five themes: (x) add dimension and meaning, (y) open the solution space, (v) encourage alignment, (w) create a broad interest and facilitate learning, and (z) build shared commitment

Paper 4
Berggren, R. () Take the Leap: Developing Change agency for Innovation. *Submitted to Journal of Change Management*

Author's role in the paper: This is a single-authored paper. Research design, data collection, analysis, and writing were done by the author.

Abstract

Earlier research has established that shifts in innovation processes – moving from idea creation to development and implementation – are challenging. Success is for example hampered through organizational inertia, bureaucracy or the "not invented here"-syndrome. To counteract such challenges, a distributed set of organizational actors need to assume change agency in the interest of the larger organization. This paper aims to create insight on *conditions to enable change agency to develop during shifts in the innovation process.* The research focuses on practices and behavioural factors that support organizational members in these shifts. The paper is based on a multi-case study of nine organizations with qualitative data from 15 semi-structured interviews. The shifts in the process are found to be facilitated factors related to organization-wide support, trust and relations and timing of involvement. Choices made regarding these factors have implications on degree of novelty or on efficiency in the process. This paper contributes to the scarce research on distributed change agency, and to research advocating for a dynamic view of innovation processes.

Main insight for dissertation

- Organization-wide collaboration supported the transfer of innovation in the organization, and thus the implementation of something new.
- Collaboration was also found to be a reason for why many had no experience of the not-invented-here syndrome. A syndrome often referred to as a central reason for why innovation is stopped during its development (e.g. Antons et al., 2017; Antons & Piller, 2015; Lucas & Jie Mein, 2013).
- Adaptability in the processes was also found to be supportive at the point of handover in the innovation process. To have clear frames to work within but freedom to be flexible for each project made it possible to have the right expertise in place and create new knowledge jointly as the project changed owners in the organization.

4.1 Connection between papers and the research questions

All four papers contribute towards exploring change agency in changing organizations where involvement is part of managing change. There are strong elements of the two research questions in all four papers.

As a reminder, the research questions are given below:

i. How does trust enable or hinder the development of change agency?
ii. How does organizational control enable or hinder the development of change agency?

Table 5 illustrates the contribution to each research question with quotes from the empirical data of each paper.

Table 5 - Overview of each paper's contribution to the research questions

	RQ *i* - Trust	RQ *ii* - Control
Paper 1	"I thought I was going to be a part of strategy making, but they [management team] just listened a lot and then I never heard back from them". "Just by being aware of the principles for conversations, I realize that we didn't have any real thinking together at all before. What we had didn't have the potential for building new ideas".	"To me it was very strong when the CEO showed us what was in the red zone and not up for discussion, and what was in the green zone and where every idea was welcome". "Why am I here? It is ok if they want to decide everything in the management team, but don't waste my time".
Paper 2	"That is what they [higher management] want, for us just to sell, they give us new products all the time[…] no one wants to know what we think". "All of us gather and go through the goals, overall status, results, and what we should think about. It is a great meeting for coaching the team and particularly good for building that team spirit and feeling of let us do it!" "It must be better that both units are one person short instead of you being two persons short. You try to help each other more and look out for each other instead of only yourself".	"This is a company that wants us to work within the framework, but inside the frames we still have a lot that we can control". "Now I feel that we are talking the same language, that cascading is successful, communication paths have become much better, simpler, and faster. In my area, I cannot believe that there is anyone who does not understand it [the goals]". "(Talking about decisions) No, I do not think [the regional manager] can either, it is higher up. It is always higher up".
Paper 3	"I felt that it was easier to present the project to the management – they seemed to trust us to do the right things". "We had a pilot with many stakeholders – inside and outside the company. We often end up in conflict, but here, we felt like we were working together in new way". "We often see a fight between pilots and operations. We did now as well, but it was easier to talk after agreeing that we aimed for the same thing".	"When we are working with a shared purpose in the initiative, we are coming up with ideas that are more creative – things that we would not have thought of without asking stakeholders to take part of a purpose". "I am not sure if we would have picked the same ideas without the purpose. We can of course not know whether that is good or bad". "The shared purpose helped to keep us on track".
Paper 4	"It just works. They know their product well enough and say "we think this is what we should do next." They have well-functioning collaborations with the right people in the surrounding organization and to some extent at the customer".	"I have tried to convey a picture of what this is about, what you want to achieve and what the cost will be, for who...and the gains. So that when we at last get to a formal decision in the steering committee, the decision is easy and made on the right grounds".

These examples of empirical data illustrate elements of trust and control in the four studies. Furthermore, we get a sense of presence or absence of change agency, for example:

"*All of us gather and go through the goals, overall status, results, and what we should think about. It is a great meeting for coaching the team and particularly good for building that team spirit and feeling of let us do it!*"

or

"*Why am I here? It is ok if they want to decide everything in the management team, but don't waste my time*".

5 Discussion

In this dissertation, my aim is to explore *how distributed change agency is supported in changing organizations.* The discussion results in four propositions that provide insights for how distributed change agency is developed and for its role in managing changing organizations.

Theoretically, we know that change agents have been the focus of discussions on change agency for several years. However, there has been a shift during the past few decades and change agency is being discussed as a distributed phenomenon (Buchanan et al., 2007; Caldwell, 2006). I believe this is an important development. The context for organizations has evolved with faster pace of change (Beer & Nohria, 2000), more ambiguity, more uncertainty (Horney et al., 2010) and, the need to be highly apt in change has increased (Reeves & Deimler, 2011). In this situation, change is managed in new ways and involves more members of the organization (e.g. Amabile & Kramer, 2011; Ancona et al., 2019; Fredberg & Pregmark, 2018; Huy, 2005; Pasmore, 2015; Reeves & Deimler, 2011). Thus, I argue that scholars and organizations need to move away from the view of change agents and change recipients. Change is not only happening top down where organizational members simply receive changes – all impacted organizational members must act on change in different ways. Examining the definitions of distributed change agency (Buchanan & Badham, 2008; Doyle, 2001) shows that the *choice* of engaging with change and *acting* on change is central. Change agency leads to action and entails a choice to engage in the change. I want to really stress that this is fundamental to my understanding of distributed change agency – action and choice.

Change readiness and resistance have been addressed extensively in the literature on managing change. That readiness for change is important for the success of change is well established. However, it does not link clearly to change agency and does not have the same focus of acting on change. As change readiness is defined, it is a precursor to behavior (Armenakis et al., 1993) and a crucial building block for creating an organization that is setup for change. Arguably, organizations need factors for managing change that creates action, and my focus on change agency makes sense at this point. That organizational members are involved as actors that holds agency for the change at hand is crucial. Most members of an organization cannot exist as bystanders without awareness or connection to the ongoing change because many have stakes in the ongoing changes; for example, their role, job description, organizational purpose, strategy, and processes are influenced to an extent. Developing change readiness in organization makes a difference as prior research has established (e.g. Armenakis et al., 1993; Choi, 2011; Oreg et al., 2011), and I do not suggest that organizations should disregard readiness. Arguably though, an organization that has members with change agency should be more prone to go through with that change compared to members with only readiness. Although, previous research has not focused on establishing a scale of change agency, we perceive the sense of a continuum based on the taxonomies proposed by Buchanan and Badham (2008) and Ottaway (1983). It is reasonable to assume that to be the change leader, you would hold more agency than if you were a passenger (see Buchanan & Badham, 2008).

We see several examples from the included studies where distributed change agency was developed and led to successful change. In paper 1, we can observe how two front line co-workers at Gedea suggest a new organizational structure to successfully meet the changes in strategy. They influenced and developed change by sharing their knowledge and perspective of the situation. In paper 2, a unit manager at Brimstone describes how the unit can conduct small tests locally which, if successful, can lead to larger initiatives that can be adapted for the organization. The sense of ownership in the unit and willingness to act on change plays a key role in how the unit re-aligns itself to the changes around them. It is an example of how organizational members, as a group, assume agency and take charge of changes

in their environment. These examples from papers 1 and 2 are consistent with the concept of distributed change agency. As the multiple change agent roles (Buchanan & Storey, 1997; Ottaway, 1983) indicate, the lone champion of change is not relevant to managing change in the way it was earlier. Instead, in papers 1, 2 and 4, a larger number of organizational members in different roles (managerial and non-managerial) are involved and hold change agency. We see how the pilot projects in paper 3 and its strong connection to purpose supported the development of change agency beyond the core change team and was a start for managing the change in the larger organization. As narrated by a manager at San Siro:

> "This has not only been a fairly fast pilot, it also seems like the pilot is at least a bit anchored in the established organization already".

I argue that organizations need to consider distributed change agency to realize and manage change as the agency is a key factor for creating action. This leads to the following proposition:

Proposition 1: Change agency needs to be a distributed phenomenon in an organization as the pace and complexity of change increases. Organizations must enable the creation of distributed change agency and manage it to successfully manage change.

All four papers have an important common denominator – involvement. A shift from planned top-down change to practices of involvement can also be seen in theory and some suggest that this is its own type of change (Beer & Nohria, 2000). Authors establish that to change an organization implies adapting and changing the actions and behaviors of its members, thus it is a shared responsibility that involves everyone to some extent (Kahn, 1974; Moran & Brightman, 2000; Senior et al., 2020). Research suggest new ways of managing change through entrepreneurship (Fredberg & Pregmark, 2018), innovation and exploration (Pasmore, 2015; Reeves & Deimler, 2011), nimble and agile processes (Ancona et al., 2019), and emotions (Amabile & Kramer, 2011; Huy, 2005). These new practices lean more heavily on the involvement and commitment from a larger circle of organizational members. Authors argue that there is an increased need for distributed change agency (e.g. Caldwell, 2003; Doyle, 2001) as more organizational members need to be involved. Furthermore, there is a call for more knowledge about distributed change agency (Wylie & Sturdy, 2018).

Involvement and agency are two concepts that are closely related and might need some clarification to how they differ. Both agency and involvement are related to actions and influence at work. Fenton-O'Creevy (2001, p. 25) defines employee involvement as "the exercise by employees of influence over how their work is organized and carried out". Furthermore, McGregor (2006, p. 72) say that "…integration means working together for the success of the enterprise so we all may share in the resulting rewards". These two views inform my understanding on involvement. In this research, involvement indicates that organizational members work together with influence and mandate over how one's own work is realized with the organizational purpose and direction as guide for the success of the organization. With regards to change agency, Doyle (2001, p. 321) explains that actors with distributed change agency "will seek to innovate, participate in and manage change within and beyond their area of responsibility – they will seek to obtain and exercise "change agency" on behalf of the organization to deliver its strategic goals". Thus, as already mentioned, I believe change agency is directly linked to action and the choice to influence change. One obvious difference between involvement and change agency is that involvement can take the form for other events than change (Sashkin, 1984), however, the focus here is involvement in change. Change agency it is developed within people and leads to actions and choices. To contrast, involvement denotes actions taken together and influence organizational work; it is not only within organizational members but entails collaboration or interaction external to individuals. Involvement can be planned and realized by an organization while development

of change agency can be supported by the organization (e.g. by trust and control). To illustrate – you can be told to *act* happily but not told to *be* happy. You can be asked to take part in an involvement focused change process, but you cannot be told to have change agency. Thus, I argue that involvement is a practice that organizations can manage and realize for working with change. However, change agency can be supported but not realized from an organizational perspective.

From the empirical studies we can observe a strong connection between change agency and involvement. In paper 1, involving a wider circle of organizational members in change does not equate to success and development of change agency. However, when involvement practices were exercised and perceived by participants as successful, change agency was supported. For example, several organizations highlighted a wider circle of participants as the key for realizing the new direction. Another example is from the workshop process at Gedea, where the head of department said:

> "Just by being aware of principles for conversations, I realize that we didn't have any real thinking together at all before. What we had didn't have the potential for building new ideas".

This manager indicates that without involvement in change and a clear process for this practice, agency was not supported enough, and many did not choose to influence or contribute with their expertise. From paper 2, we also see examples of how involvement supported change agency. One employee at Brimstone explains how they work for dealing with increased competition due to growing digitalization demands:

> "We continuously meet to discuss what needs to be done to meet [the] upcoming digital competitors. We address [the] internal barriers and discuss [how] our roles and tasks [might shift in focus]".

This employee indicates how working with involvement is important for the team to be able to influence and engage with change. This quote alludes to a sense of ownership and stakes in the change. Another organizational member at Brimstone describes how they work closely together:

> "All of us gather and go through the goals, overall status, results, and what we should think about. It is a great meeting for coaching the team and particularly good for getting that team spirit and feeling of let us do it!"

This is a genuine response that refers to the engagement created from involvement and the indication of agency, the determination to act – 'let us do it!' Similarly, at San Siro (paper 3) one team member reflected on the new way of working with pilots:

> "We are not used to sitting down and actually discussing what we want to achieve together. On our first attempt, we found that it clarified a lot".

According to another team member at San Siro:

> "We had a pilot with many stakeholders – inside and outside the company. We often end up in conflict but here we felt like we were working together in new way".

Both quotes illustrate the increased feeling of unity and ownership of the change process. I argue that these feelings of ownership and stakes in the change are highly relevant as enablers for the development of change agency. The previous quote from Gedea's head of department also indicates that involvement becomes an invitation of sorts from the organization (albeit often unspoken) to its members to act and engage.

In this research, we can also see examples of when involvement did not work. Rather than a resulting invitation to act and engage, it turned out to be a source of distrust and frustration. For example, the reflection from one participant at Kafea (paper 1) is as follows:

> "I would have liked to know about the next step and be invited to something more, not just the presentation of the finished document. I would have wanted... anything. A thank you would have been nice".

On the same note, an organizational member at Mercury (paper 2) said, "You cannot pretend that people have a say and can contribute with ideas when none of them are realized". In these two examples involvement did not play out as planned; rather than support for change agency, it resulted in unwillingness to act. This indicates that involvement is not only about being allowed to voice opinions nor does it suffice as a work method. In the examples of involvement that supported change, there is an element of doing where organizational members were invited and given an opportunity to act. However, in the examples where involvement was unsuccessful there is a feeling of disappointment that no results emerged from one's engagement and action. Reflecting on Pasmore and Fagans (1992) continuum of involvement, it seems reasonable to assume that a higher degree of involvement can provide organizational members an opportunity to develop higher levels of change agency. At higher levels of involvement, organizational members can create more and take on more ownership. Although, it is also important that organizational members' expectations of involvement are delivered upon. If team members expect direct results from their engagement but the same does not happen, disappointment and adversity arise instead of change agency and positive attitudes.

Perhaps, considering how organizational members can be invited to the change and how willingness to act can be influenced is one of the foundations about how change agency can become distributed and supported from an organizational perspective. In my research, I have found that involvement, especially higher degrees of involvement, played a key role in creating this invitation and how organizational members developed distributed change agency. Thus, as Caldwell (2003) points out, when more organizational members are involved in change, the need for distributed change agency increases. However, the creation and management of involvement during change, especially if allowing for high degrees of involvement, enables organizational members to develop higher degrees of change agency. As such, involvement is multifaceted, it is required to succeed with faster and more complex change but functions also as an approach for the organization to manage the spread of change agency – to manage distributed change agency. This leads to my second proposition:

Proposition 2: Practices of involvement are ways for organizations to successfully distribute and manage change agency.

All organizations are using and experiencing different forms of organizational control, it is part of organizational life. Organizational control can enable and orchestrate actions that organizations desire (Alvesson & Kärreman, 2004). Traditionally, organizational control has been bureaucratic and coercive (Cardinal et al., 2017). In all four papers though, we see good examples of multiple forms of control being employed simultaneously, such as clear processes (technocratic) and informal ways of creating trust and alignment to common agenda (normative). If we look at paper 2, we learn about change in organizations that can be characterized as tightly coupled systems (TCS), thus, experiencing a very high degree of technocratic and normative organizational control. We also learn about change in situations with strong technocratic control through prescriptive processes (papers 4 and 1) and strong normative control (paper 3) albeit, these situations do not seem to have the same number of control levers as a TCS. In a TCS, the organization is highly dependent on internal alignment with regards to processes,

strategy, norms, and culture. Research suggests that change is difficult in a TCS unless it is organization-wide and done in a big-bang manner (Burke, 2014). Similarly, even if it is only a subset of the organization, other high control settings can experience similar rigidity and thus, difficulty to change.

In my research, this rigidity and its impact on change can be observed. In paper 1, we see examples of how ill-used or misaligned process controls harmed strategy creation and change instead of supporting it. When the process for strategy workshops was unclear or did not meet expectations, organizational members lost trust in both the management and process. In organizations where the process facilitated fruitful discussion and delivered on the perceived promises, organizational members developed trust in the management, felt that they were part of the change and decided to get involved in influencing the change. Interestingly, in paper 2, there are indications that both existence and lack of control had a negative impact. This duality or balancing act is also mentioned by Doyle (2001). We see examples of how organizational members in some units articulated that overly strong bureaucratic control in processes and strategies limited freedom and creativity. For example, a unit manager at Salt said:

> "[There are] both pros and cons. I come from [a retail chain] where they have their own franchise owners and decisions are made in the store. There, decisions can take two minutes. Here, that does not work since decisions are made higher up and I think that it is good in regard to what we sell […]. But it is the small things when it comes to assortment and such where we become too static, how to put it...too old fashioned perhaps…we would need to loosen up some routines and some rules".

In other units, lack of normative control, for example, in community support or lack of managerial presence, led to absent direction or low organizational alignment. In both cases, the result was difficulties to adapt and change. However, in the same study, other units found support for change and creativity through the tight structures of the system –strong technocratic and normative control. Such units found many control structures were supportive and perceived it as a framework to function and be creative within. Similarly, in paper 3, several participants indicate that the new process and normative control with a strong connection to organizational purpose facilitated the innovation projects to be more creative and attract greater attention in the organization. According to a project leader at San Siro:

> "When we are working with a shared purpose in the initiative, we are coming up with ideas that are more creative – things that we would not have thought of without asking stakeholders to take part of a purpose".

Arguably, control is not the factor determining success or failure to change. It is more about how control is used or its quality that makes a difference.

A common denominator in studies with successful change was that control mechanisms made sense to organizational members and were consistent with the organizational direction. This aligns with Alder and Borys (1996) research on what is perceived as "good" control when there is alignment of organizational and personal goals. Similarly, from the perspective of organizations as systems, alignment of organizational factors is found to be the crucial element of a successful enterprise (Beer, 2009; Galbraith, 2014). Acknowledging that control is situational (Cardinal et al., 2004) and not static is important to be prepared to change. Control needs to be viewed as any other factor that needs to adapt as the organization moves forward in its change journey. Using appropriate control structures at the right time can support change, while failing to do so could feed resistance or hamper the change journey. Paper 4 is an example of how technocratic control, in this case the innovation process, can be flexible yet provide frames that support change and collaboration. In several organizations, handover of innovation projects from one owner to another, specifically when the project shifted phases, was not

highly controlled in terms of when and who to include. This enabled organization-wide collaboration and allowed teams to meet the needs in their specific project. Furthermore, the receiving teams were better prepared and had an opportunity to transfer knowledge from the previous phase. It is reasonable to believe that this collaborative mindset and flexibility in the process during change supported their development of change agency.

In paper 2, we find that units in tightly coupled organizations that were able to adapt and re-align had normative and enabling control mechanisms that supported collaboration, autonomy, and connection to organizational purpose. This finding is consistent with Alvesson and Kärreman (2004) and Cardinal et al. (2017). In the successful units, organizational members were more aligned with the strategic direction and believed that the control structures made sense. Similarly, in paper 1, when organizational members' expectations of the process and change and reality of the process were aligned, trust was built, and the change was more easily realized. Thus, using control levers that are aligned with personal and organizational goals are important for supporting the development of change agency. In these cases, organizational control enabled organizational members to act and develop agency for change. For example, in paper 2, a unit manager at Brimstone narrated how the team decided their marketing strategy for a monthly targeted product and emerged as the highest selling unit for that month. In another example, a co-worker at Salt indicated to their agency, despite strict control, that:

> "This is a company that wants us to work within the framework, but inside the frames we still have a lot that we can control".

Here, we can see how organizational control does not replace change agency but can support in developing it. It seems that control structures that support organizational members to take part in change and provide a sense of mandate to act are positive for the development of distributed change agency. In paper 1, organizational members were positive and indicated to more distributed agency and willingness to act when the process was clear and this promise was also delivered on. These successful process and normative controls, that is, what to do and how to do it, allowed non-managerial participants to act and get involved in strategy creation and change work in which they are not normally involved. This indicates that they were able to develop agency for change. Similar results were found in paper 4, where the focus is on how agency for change is developed and distributed during shifts in innovation processes. In paper 4 we see that a balance between control and freedom is needed to support change agency. Overarching processes and alignment to purpose was positive but simultaneously there was a need for flexibility and collaboration.

To conclude, my research shows that organizational control does not need to equal rigidity and hinder members from having agency for change. Instead, I have found that appropriate organizational controls that were aligned with the change and organizational goals and allowed organizational members to act on change were positive for the development of distributed change agency, leading to the following proposition:

Proposition 3: To successfully manage change, organizations need put in place control structures (technocratic and normative) that enable distributed change agency.

Control can be seen as an opposite to trust. If there is a lack of trust among organizational members to perform or act as wanted, control can take its place to ensure that the intended activities take place. This is the logic of the principal-agent theory. Control structures (e.g. agreement, process, policy) are required if the agent and principal have diverging interests to ensure that the agent acts in line with the principal's wish (Eisenhardt, 1989a). Some research also suggests that control structures substitute trustworthiness. Instead of considering an organizational member as trustworthy, one ascribes behaviors

to the controls (Rousseau et al., 1998). However, in my studies (especially papers 1 and 2), control and trust co-exist. In paper 2 for example, one co-worker at Brimstone explains how they meet regularly to review goals and how to work, that is, using typical control structures. Furthermore, the co-worker notes that such meetings provide a good opportunity for coaching the team and creating team spirit, indicating trust in the group and how it is created by some control structures. As previous research suggests (Rousseau et al., 1998; Schoorman et al., 2007), organizational control supports trust. In some cases, trust could be viewed as a form of control itself. As Adler (2001) explains, trust is one form of coordination for managing an organization – to control an organization. Thus, trust can be a normative form of control for creating standards of how to act and a community that one does not want to stray from. For instance, Ouchi (1980) writes about organizations as clans from this perspective.

We already know that trust plays an important role in the success of an organization from the perspective of communication (McAllister, 1995), motivation (Amabile & Kramer, 2011), task performance (Lines et al., 2005), and bottom line (Covey & Conant, 2016). Furthermore, we know that trust for leaders, change as such, and change drivers play an important role in changing successfully (Choi, 2011; Lines et al., 2005; Oreg et al., 2011; Whitener et al., 1998). To be able and dare to act, organizational members need to trust the community around them. If an organization is dominated by low levels of trust, it is possible that no one will dare to act or take risk to support change due to fear or uncertainty of the responses from the rest of the organization. For example, one interviewee from Mercury (paper 2) explained that the team was increasingly distrustful and that s/he felt that they were spending more time assessing each other's performance than working by themselves. According to another interviewee from Salt:

> "I would have liked to get help from someone, [for] someone [to have] called or visited to check […]. Here, we hear "this and this needs to be done, well then you can drive that," but I do not feel that it is my place to drive that. I do not feel that I have [the] mandate to implement new ways of working. It is my manager's job to do so".

In this quote, we hear expressions of both lack of trust in the organization and reluctance to act. This organizational member was not able to develop enough change agency to engage in the change process. There seems to be a parallel between distrust in the organization and reluctance and absence of agency. Similarly, in paper 1, trust was lacking in some of the processes, and in some examples the workshop created distrust. According to one participant at Ivea:

> "Why am I here? It is ok if they want to decide everything in the management team, but don't waste my time".

This strongly indicates lack of trust in the management team and conveying a feeling of disengagement and unwillingness to take part and act.

However, in paper 1, trust dominated several of the change processes and was perceived as very successful. Some strategy creation workshops were characterized by trust and this was crucial for their success. Similarly in paper 2, interviewees from high performing units indicate trust in the team or management. According to a unit manager at Brimstone:

> "I really want to work with my group, no one should meddle with my group because I have put a lot of energy and time into creating a team. A well-functioning team in all aspects, both in regard to work environment and efficiency, in regard to delivering results and reaching goals, all aspects!"

Furthermore, in paper 3, we observe some positive aspects of trust and a connection to distributed change agency. According to one project manager, “I felt that it was easier to present the project to the management, as they seemed to trust us to do the right things”. Here, both trust in and from the management seem to play an enabling role in the development of change agency. This also indicates a feeling of mandate, and the organization allowed them to act. I argue that these feelings, of being allowed to and dare to act, that trust can result in are important. This is part of how an organization can enable distributed change agency through trust. By developing trust in teams and the management, organizations can influence distributed change agency.

My findings show that trust can support action and play a role in the development of change agency, leading to the following proposition:

Proposition 4: Higher levels of trust (for and from others) increase the tendency of organizational members to dare to act. Thus, organizations can enable and manage distributed change agency by creating trust.

Change agency, which is internal to organizational members, is perceived as a tricky factor to manage from an organizational perspective. It is influenced indirectly by the organization. The two elements of focus in this thesis – control and trust – are catalysts the organization can enable or spark the development of change agency, as illustrated in figure 5. Thus, control and trust become ways for how an organization manages distributed agency.

For organizations to use these two catalysts and manage change agency, it seems that managerial action is central. In the strategy workshops investigated for paper 1, three pivoting factors were found in the processes that were essential to create trust in these workshops and factors (opening up the conversation, clarity in the participative process, and delivering upon honest intent) were all initiated or employed by the managers in the workshop. Previous research shows that middle managers are important for creating trust (Whitener et al., 1998). However, in this research, managers are found to be important for creating trust as part of the environment that supports the development of change agency. In contrast, creating trust as a success factor in a more general sense. According to a unit manager at Mercury (paper 2):

> “I see this as our own company, sometimes I do not think about that we have a headquarters...this is our own unit and in order to make it we need to maintain it financially, maintain customer satisfaction, employee happiness, [and] the social setting. [If we can] we do all that then we can keep our work”.

Not only does this show a sentiment of agency but it also illustrates how managerial action plays a role in creating this environment. Furthermore, this manager talks about the unit and its environment in terms of “we” – we need to maintain…alluding to the practices or a mindset of involvement. In paper 4, managerial action was also part of creating agency in the organization. In this study, we see examples of how sponsors (usually top managers) navigate the organization to create involvement and prepare the organization for receiving new innovations. Furthermore, we see how trust and a hands-off mindset can be an invitation to act and get involved in driving the change. As one product manager said when describing how s/he was working with a team and how they could manage themselves:

> “It just works. They know their product well enough that they say, "we think this is what we should do next". They have well-functioning collaborations with the right people in the surrounding organization and to some extent at the customer”.

To summarize, managerial action is a key approach for an organization to employ supportive control structures and build trust to influence and enable the development of change agency.

In this dissertation I uncover and discuss factors and practices that support or hinders change agency. See figure 5 for an illustration of where the propositions are situated in relation to the different concepts discussed in the thesis.

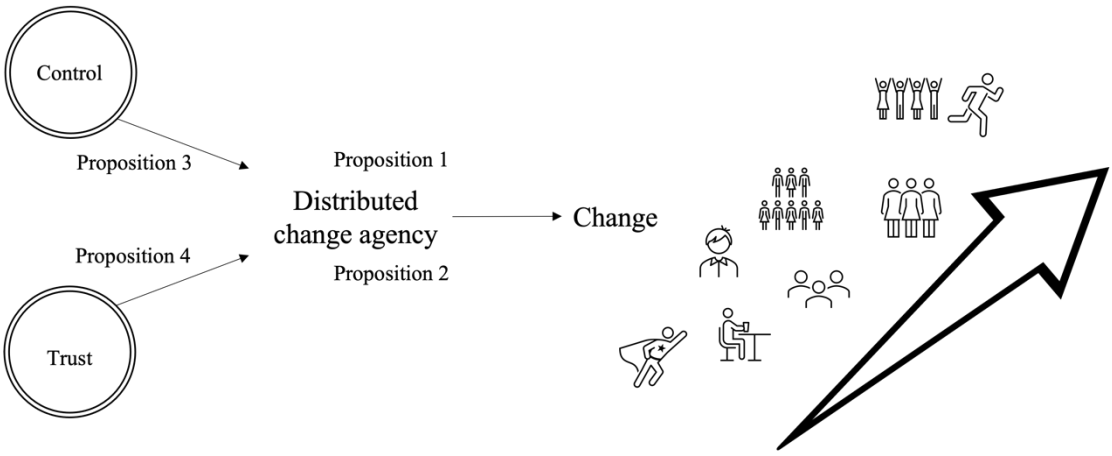

Figure 5 - Illustrating research on two factors for managing distributed agency for change

I conclude that organizational control and trust are important factors to create an environment that supports the development of agency for change. I suggest that these two concepts could be considered as catalysts that an organization can manage to indirectly influence change agency. Furthermore, I suggest actionable insights for organizations to manage change with change agency in mind. Specifically, I mention the role of managerial actions for organizations to manage change agency.

6 Conclusion and contribution

This doctoral dissertation explores how distributed change agency is supported in changing organizations. I fulfill the aim through the four propositions. Proposition one speaks towards the overarching aim to establish the meaning and role of distributed change agency. Proposition two responds to the ambition to investigate distributed change agency in relation to change with broader involvement. Proposition three responds to research question *i* regarding organizational control. Lastly, proposition four responds to research question *ii* regarding trust.

To fulfill the initial part of the aim of this thesis, I establish the meaning of distributed change agency and say that it entails both choice and action and can encompass all organizational members. Furthermore, I clarify that distributed change agency is exercised in alignment with the direction of the organization and is not tied only to personal goals. In agreement with previous research (Buchanan & Badham, 2008; Caldwell, 2003, 2005; Doyle, 2001; Ottaway, 1983), I argue that change agency needs to be seen as a distributed and widespread force for change. Moreover, based on this research, I highlight the importance of distributed change agency for realizing change as, contrary to change readiness, it is inherently tied to action. The world is fast changing, stability is no longer the normal, and change is often not a planned and top-down endeavor. With this backdrop, an increasingly large number of organizational members have stakes in change and are affected. Even though they may not be enlisted in a change project directly, they will need to adapt. These circumstances motivate the increased need for distributed change agency. Thus, organizations need to consider how they can enable members in developing change agency. To put emphasis on the increasing need to consider distributed change agency and respond to the aim of exploring the role and meaning of the concept I suggest my first proposition:

Change agency needs to be a distributed phenomenon in an organization as the pace and complexity of change increases. Organizations must enable the creation of distributed change agency and manage it to successfully manage change.

Furthermore, I identify that change involving a larger number of organizational members is not only a way to deal with fast paced and complex changes, but it is also a method for organizations to manage distributed change agency. Involvement in change becomes an invitation to organizational members to develop change agency and is thus, a practice to distribute agency and enable it to develop. Accordingly, I fulfill my aim to explore change agency in organizational change characterized by broader involvement and make the following proposition:

Practices of involvement are ways for organizations to successfully distribute and manage change agency.

I answer my two specific research questions focused on how organizational control and trust respectively enable or hinder the development of change agency. We know from previous research that organizational control and trust are foundational mechanisms for managing organizations (Adler, 2001). We also know that control and trust play a key role in management quality (Ghoshal & Bartlett, 1994). Therefore, I have explored the role of organizational control and trust for distributed change agency when managing changing organizations. Change agency is part of the inner workings of people and organizations can only indirectly influence the development of change agency. However, actively doing so is arguably part of successfully managing organizational change. To answer the two research questions, I make two propositions:

To successfully manage change, organizations need put in place control structures (technocratic and normative) that enable distributed change agency.

Higher levels of trust (for and from others) increase the tendency of organizational members to dare to act. Thus, organizations can enable and manage distributed change agency by creating trust.

I suggest that organizations can develop an environment characterized by control and trust that will enable the development of change agency. Furthermore, organizations can think of these two factors as catalysts that managerial action can be linked to, as a way to manage change agency.

6.1 Theoretical contribution

This research pushes our perspective on change agency as I establish it as a factor for managing changing organizations. I do not discuss change *agents,* instead I talk about change *agency* as it is more relevant when we view change agency as distributed. This research contributes to theory on distributed change agency (Buchanan & Storey, 1997; Caldwell, 2003, 2005; Doyle, 2001), a topic that has not received adequate attention (Wylie & Sturdy, 2018). I add to this theory by clarifying and putting emphasize on what distributed change agency means. I highlight that distributed change agency entails both choice and action and can encompass all organizational members. Furthermore, by taking an organizational perspective I put focus on that distributed change agency is exercised in alignment with the direction of the organization and is not, in this view, tied only to personal goals. I do not attempt to re-define distributed change agency but contribute to our understanding and exemplify it through my research. In my opinion, this can be more helpful for continued research than adding another definition to the list as it gives an idea of how research can be developed and what distributed change agency can look like in empirical work.

Furthermore, I suggest that involvement, control, and trust enable the development of change agency among organizational members. I argue that organizational control and trust are catalysts that an organization can use to influence and increase the spread of distributed change agency in the organization. I also suggest that managerial actions relating to employing supportive controls and building trust are key practices for managing change agency. Thus, I contribute to the theory on how to manage change agency, a topic with limited knowledge (Caldwell, 2003). Moreover, in agreement with previous research, I find that organizational control needs to be seen as situational (Cardinal et al., 2004) and needs to make sense to the organizational members (Adler & Borys, 1996) or else the organization run the risk of hampering the development of change agency. Previous research has also suggested that trust can be a form of control (e.g. Adler, 2001., Ouchi, 1980) or that control can substitute trust in organizations (Rosseau et al., 1998). I extend these arguments as I discuss how trust and control can and need to co-exist in organizations to support organizational change and distributed change agency.

This dissertation and the appended papers also contributes to research on organizational development and change, as I add to our understanding of managing change by involving more organizational members (previously e.g. Amabile & Kramer, 2011; Ancona et al., 2019; Fredberg & Pregmark, 2018; Huy, 2005; Pasmore, 2015; Reeves & Deimler, 2011). I argue that, as more organizational members become part of change, we need to look to distributed change agency as an element of managing change.

6.2 Practical contribution

This dissertation contributes to practice by emphasizing the importance of distributed change agency in organizations. I suggest that organizations must think about supporting the development of distributed change agency and not put focus only on change agents (equated to champions or change drivers). For

organizations to be set up for change, their organizational members need to easily develop change agency and act during change.

By suggesting two factors (control and trust) of the organizational environment that play a role in how members develop change agency, I contribute with advice on where to focus the efforts in developing the organization. It is well established that change is difficult to realize in organizations with failure rates reported at 70% (Beer & Nohria, 2000), and my work attempts to support organizations in finding new ways to approach change management and attain their goals.

Furthermore, by highlighting the role of managerial action to exercise control and trust as catalysts, I provide practical suggestions on how organizations can approach managing distributed change agency. The research in this dissertation provides examples of both structural, processual and behavioral actions in organizations that play a part in enabling the development of distributed change agency through trust and control. Many of these actions are implemented through managers.

6.3 Future research

Early in the discussion, I argue for my focus on distributed change agency over other aspects, such as change readiness, due to change agency's inherent association with action. Theoretically, the different roles in distributed change agency are known (Buchanan & Badham, 2008; Ottaway, 1983), and allude to a sense of scale of agency. At the very least there could be agreement on, based on my research and previous theory, that agency for change is not binary. However, does the amount of agency a person holds matter for realizing change? Can we even measure agency? These questions of measurability are not explored to any substantial degree but could be an interesting topic that opens for further research.

Furthermore, how control and trust interact, has not been discussed in this dissertation but poses an area for future study. There are some insights into how the two factors and involvement can influence each other; for example, high control could substitute trust in a team as actions ascribe control instead of trustworthiness (Lines et al., 2005). However, from the perspective of change agency, we must learn more about the need to balance these three concepts. Perhaps one factor can become overly dominant. These are interesting aspects and need further investigation.

An important development in research on changing organizations is dynamic capabilities (Teece et al., 1997). These capabilities are described as a triad that gives an organization the ability to shift and remain flexible: sensing, seizing, and reconfiguring (Teece, 2007). Dynamic capabilities are discussed at an organizational level and can be questioned for their practical application. However, it would be interesting to look closer at change agency as contributing to an organization's dynamic capabilities. If change agency plays a role in dynamic capabilities, it would bring this ability to the level of organizational members and perhaps a more practical realm.

Lastly, an interesting finding in papers 1 and 2 is that many organizational members voiced frustration when their contribution and ideas were not realized. As illustrated in paper 1, the reflection of one participant at Kafea: "I would have liked to know about the next step and I would have liked to be invited to something more, not only to the presentation of the finished document. I would have wanted. . . anything. A thank you would have been nice". On the same note, an organizational member at Mercury (paper 2) said, "You cannot pretend that people have a say and can contribute with ideas when none of them are realized". This frustration could be interpreted as the result of being excluded from a change process that s/he had agency in; they felt ownership and engagement for the change they had been part of creating. There seems to be reversed involvement. How this rejection or anti-involvement plays out

in organizations needs further research. Although how agency in change can be impaired due to different actions and practices is not the focus of this study, it poses an interesting topic for future research.

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