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Article

Learning From Collaborative Action Research in Three Organizations: How Purpose Activates Change Agency

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Abstract

Based on a 2-year collaborative study, this paper explores purpose as an enabler for change agency during the integration of new organizational concepts. We followed three organizations that attempted to actively use purpose to motivate and negotiate innovation-based change initiatives in their respective organizations. Data were gathered through a set of interviews and collaborative inquiry workshops, conducted individually with each organization and collectively with all three. Based on the data, the paper systematically analyzes five ways of how purpose may activate change agency. Moreover, the paper suggests that activation of distributed change agency can support the management of contextual ambidexterity. This study also points toward how other organizations can use the acquired knowledge, both from the study and the collaborative inquiry process.

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Introduction

An organization's purpose has been described as "the ultimate reason for the organization's existence—what it contributes to society in exchange for the resources it requires—as distinct from the goals pursued by the individuals in it" (Adler & Heckscher, 2018, p. 82). Furthermore, Adler and Heckscher (2018, p. 82) defined *shared* purpose as "the commitment experienced by a large portion of the organization's members: the degree of sharing may vary, but at a minimum, it goes beyond the top management team." Previous research points toward shared purpose being the key to navigating a complex world (Bonchek, 2013; Craig & Snook, 2014). Fields where purpose has been found to be an important factor for success include strategy (Ghoshal et al., 1999), innovation collaboration (Maria et al., 2010), and organizational development (Beer et al., 2011). In other settings, purpose has been discussed as a tool to motivate employees (Birkinshaw et al., 2014), enable sensemaking (Amabile & Kramer, 2011), arbitrate uncertain decisions (Quinn & Thakor, 2019), facilitate the finding of higher order solutions to paradoxical tensions (Bonchek, 2013; Fredberg, 2014; Fredberg & Pregmark, 2018), and contribute to organizational performance by offering clarity of direction and aiding middle managers while making decisions (Gartenberg et al., 2019). Hence, it is important to understand how purpose enables the change agents to act.

Although change agency is a key term in the change literature, surprisingly few contributions have explained its conceptual meaning. Much focus has been on the actions performed by change agents (Buchanan & Badham, 2008; Ottaway, 1983). This study is less concerned with change agents and more focused on the change agency that becomes distributed in an organization. Distributed change agency can be defined as the will of a person or a team "to innovate, participate in, and manage change within and beyond their area of responsibility" (Doyle, 2001, p. 321) and that "they will seek to obtain and exercise 'change agency' on behalf of the organization to deliver its strategic goals" (Doyle, 2001) Building on this and earlier definitions, we define change agency as (1) willingness, (2) ability, and (3) permission or encouragement to act. As evidenced by cases of individuals and teams becoming involved in change, agency may be dormant and can be activated through managerial action. Hypothetically, purpose could play a key role in the activation of agency in an organization as it often constitutes a call to action and an implicit, albeit limited, approval of initiatives in line with the purpose (Bonchek, 2013; Fredberg & Pregmark, 2018). However, distributed change agency has not been explored to the same extent as the traditional view of a change agent as champion and expert (Caldwell, 2003; Wylie & Sturdy, 2018).

We draw on a collaborative action research study of three organizations—San Siro, Old Trafford, and Wembley (pseudonyms)—in which our prime contacts were striving to innovate inside the main organization in response to disruptive forces in their respective environments. Phrased differently, the organizations were characterized by a need to create contextual ambidexterity—the ability to have both innovation and established operations succeed in the same organizational structure (Birkinshaw & Gibson, 2004). Research has long acknowledged that innovation and established operations build on different logics. This increases the perceived complexity, resulting in hard-to-solve

organizational allocation problems. Managers need to attend and allocate resources to both, while knowing that supporting one reduces the likelihood of success in the other.

The company representatives, all engaged as innovation drivers in their respective contexts, expressed interest in exploring the role purpose could undertake in their innovation activities. To enable in-depth insights into the role of purpose, we designed a collaborative process approach, wherein the company representatives and research team intervened by actively creating a focus on purpose in the innovation pilots pursued by the change agents. We collectively strived to learn about the role of purpose for enabling change agency in an established organization. In our specific cases, this involved driving innovative activities closely to the established business. We facilitated continuous learning workshops as the innovation pilot teams progressed with their work. As argued by Tuominen and Lehtonen (2018), change agency is not directly observable in organizations, and as a consequence, we collected data during the collaborative study on how purpose made a difference in the way change actors were able to work and exercise their change agency.

Our specific setting was a set of innovation pilots in the organizations. The researchers collected data through 22 interviews with the participating change actors. Moreover, participants' reflections in the different learning workshops (three company-specific and six workshops including all three companies) were noted. Moreover, the research team kept notes in a learning journal and documented continuous interactions with the pilots and the change actors. We followed the change actors over a period of 2 years and obtained insights using a collaborative method from the beginning till the end of these innovation pilots.

The results indicate that purpose plays diverse roles in shaping the management and progression of the innovation projects, as well as in supporting project members and the wider organization in cultivating change agency by (1) adding meaning and direction, (2) opening up solution space and encouraging relevant ideas, (3) encouraging continuous alignment, (4) creating broad interest and facilitating learning, and (5) building shared commitment. Moreover, the findings indicate that the chain of influence also was reversed; the process of trying to achieve change influenced and helped develop the organizational purpose. This study contributes to the literature by discussing the role of purpose in enabling change agency. It expands the knowledge on the role of a shared purpose in supporting innovation and change. Furthermore, we hope that this study advances ideas for how collaborative action research approaches can be conducted to strengthen both rigor and relevance.

Theoretical Framework

The structure of the theoretical framework is as follows: first, we discuss the role of purpose in organizational development and change and, second, the role of change agency and change agents in organizations. This paper focuses on change agency and in particular distributed change agency. To understand the data regarding the different change actors in our study, we have also included literature defining and discussing change agents.

Purpose as an organizational construct has been frequently discussed in recent years (Gartenberg et al., 2019; Pregmark, 2022; van Ingen et al., 2021). However, the term still seems to lack a comprehensive definition (Lleo et al., 2019; van Ingen et al., 2021), and the boundaries between purpose and other constructs (such as vision, mission, and values) are often blurry. Gartenberg et al. (2019) argue that the purpose intends to create meaning in an organization. Purpose-washing or the misalignment of the articulated purpose with the company's conduct (Delmas & Burbano, 2011) has been an often-discussed problem when researching purpose. Previous research, therefore, has argued that it might be more useful to investigate the use of a purpose, its potential effects, and its implementation process instead of its essence. However, prior research has often been conceptual. Therefore, empirical insights into how organizational purpose is transformed into action should be of interest to explore. This paper aims to do so.

A (higher) purpose is crucial for opening a solution space for innovation (Collins & Porras, 1994). Purpose has the potential to play the role of a unifying force and as an "arbiter of decisions" to support decision-makers when a plan or strategy is lacking (Quinn & Thakor, 2019). In this function as a clarity-making factor, purpose has been shown to be linked with higher levels of performance (Gartenberg et al., 2019). A shared purpose or vision can facilitate crucial conversations about paramount strategic issues (Liedtka & Rosenblum, 1996). Thus, adding direction and meaning can help develop an agenda for critical dialogue. Moreover, a shared purpose forms the basis for the trust needed for collaboration in organizations situated in dynamic environments (Adler & Heckscher, 2018). Purpose-based trust works as a control mechanism in organizations (Adler, 2001) and as such, a shared purpose acts as a guide, allowing managers to let go without losing control (Bonchek, 2016).

Purpose also plays a role in navigating change and innovation (Pregmark, 2022). Established organizations must simultaneously focus on innovation and current operations in the same structure to be contextually ambidextrous, which is considered essential for long-term success (Papachroni et al., 2016; Pregmark, 2019; Smith et al., 2010). However, it is often problematic because exploitation and exploration require different foci, capabilities, and logic (March, 1991; O'Reilly & Tushman, 2013). Striving for ambidexterity drives complexity, which translates into paradoxical tensions (e.g., resource allocation issues) that managers find difficult to solve (Andriopoulos, 2003; Fredberg, 2014; Smith & Tushman, 2005). According to Poole and Van de Ven (1989), such paradoxical tensions may be resolved by higher-level solutions that allow for the reconceptualization of the problem. Andriopoulos and Lewis (2009) noted that adopting a vision or purpose that encompasses both ends of paradoxical tension can help integrate conflicting perspectives. It follows that the organization and its members need to engage in a new process of learning of how to both strategically and operatively handle the paradoxical tensions but also to learn how to learn by using, for example, continuous dialogue to collectively comprehend how to make decisions, drive creativity, allocate time and resources, etc. Such dialogues constitute a kind of learning mechanism (Fredberg et al., 2011; Shani & Docherty, 2003)

that organizations take on to continuously make decisions in situations of uncertainty and ambiguity and design organizational solutions.

The relationship between structure and agency has been a central concern of philosophers and scholars for centuries (Emirbayer & Mische, 1998). Agency is linked to action. Actors interact with the surrounding environment—with persons, places, meanings, and events (Emirbayer & Mische, 1998). Hence, agency includes creating a change in, or of, a system and is intentional. In much research on change, agency is used to explain deliberate actions (Tuominen & Lehtonen, 2018).

Some authors choose to simply define change agency as roles "… aimed at effecting successful change in individuals and organizations" (McCormack et al., 2013, p. 107). Defining change agency in one dimension is both practically and theoretically challenging (Caldwell, 2003, 2005). The diverse nature of change agency in organizations is apparent in research on organizational change.

In this research, we rely on descriptive definitions that relate to what change actors do and the role they take in an organization when exercising change agency. Focusing on the change actor, previous research has provided discussions and definitions around change agents. Some authors stress that change is a managerial task that can be planned and executed in an orderly manner (Caldwell, 2005). Therefore, the actors in charge of change are often assumed to have managerial positions. Other authors discuss that change agents can be defined by the roles that they take, such as initiators, main drivers, or sponsors/patrons, and other people involved in change processes, such as spectators, victims, and defenders (Buchanan & Badham, 2008; Ottaway, 1983). One definition of change agents describes them as "…all who are actively seeking to influence change, regardless of their formal role or job title" (Buchanan & Badham, 2008, p. 7). Similar loose definitions of change agents are common in other important contributions (e.g., Battilana & Casciaro, 2012).

Others have pointed to the conditions for change agents as they aim to influence the social setting where they act (Battilana & Casciaro, 2012) and have noted that not all have managerial authority as a basis for power. Also Balogun et al. (2005) pointed out that internal change agents in nonmanagerial roles are in need of other practices, as they lack the authority that comes with a managerial role.

Some authors speak of change agency as a distributed phenomenon in organizations and relate it to the shared responsibility of making change happen (e.g., Buchanan & Badham, 2008; Caldwell, 2003, 2005; Ottaway, 1983). As such, change agents can take on many different roles which is positive for the progression of the change initiative or the general development of the organization (Buchanan & Badham, 2008; Ottaway, 1983). Doyle (2001) argued that change agency is the will of a person or a team "to innovate, participate in, and manage change within and beyond their area of responsibility" (Doyle, 2001, p. 321) and that "they will seek to obtain and exercise 'change agency' on behalf of the organization to deliver its strategic goals" (Doyle, 2001). Based on his argument and the previously mentioned definition of the task of change agents, we assume that change agency involves (1) willingness, (2) ability, and (3) permission/encouragement to act. It is reasonable to assume that change agency is not passive but involves the action being taken.

Apart from attempting to define agency and agents, research has also linked some generic change capabilities to change agents irrespective of role, such as being skilled at communication, acting with openness, and being a good and tolerant listener (Buchanan & Badham, 2008; Charles & Dawson, 2011). Along the same theme, research suggests that practices engaging and enrolling others in the cause of change are central to an actor in the role of driving a change endeavor. Furthermore, these practices mean that change agents need to be skilled at playing political games (Balogun et al., 2005; Buchanan & Badham, 2008).

Based on earlier research that pointed to the necessity of a purpose for providing clarity, especially to middle managers, and its association with performance (Gartenberg et al., 2019) and on research that found the purpose of supporting decision-making (Quinn & Thakor, 2019), it is reasonable to assume that purpose is important for elevating change agency, especially in situations where such agency needs to be distributed in an organization to create momentum for change. Earlier research has suggested that widespread engagement and commitment in organizations are positively correlated with change success (Burke, 2011). Though not explicit about purpose, Armenakis et al. (1993) suggested the change message is key to creating readiness for change, and Sonenshein and Dholakia (2012) found that the more employees adopted a "strategy worldview" that created meaning for them, the more they felt engaged with the change.

The focus on actions taken to convince people to participate in change efforts suggests that employees may inherently possess the possibility of exercising change agency, but that agency may be lying dormant and may become active through managerial action. Therefore, theoretically, purpose should play a key role in the activation of agency in an organization.

Method

Collaborative Research Approach

This paper draws upon a collaborative action research study (Beer, 2013; Coghlan & Shani, 2014; Docherty & Shani, 2008; Shani & Coghlan, 2021a; Shani et al., 2007) of three companies: San Siro, Old Trafford, and Wembley (pseudonyms). We understand collaborative inquiry or collaborative management research as umbrella terms encompassing different forms of collaborative approaches. Following Shani et al. (2007), we think of such approaches as including joint ambitions for the research, joint data gathering, and joint analysis of the material. Such research can be of an analytical nature, and although the research process in itself would have effect on the organization, that would not necessarily be the aim of the research project. Acknowledging that action research is used in a number of different research fields such as education and healthcare, we think of action research in organization development as an approach with the ambition to change something in an organization to understand the effects on a social system (Coghlan & Shani, 2014; Schein, 1987; Shani & Coghlan, 2021b). Action research necessitates information sharing between researchers and organizational

representatives, as covert operations are generally considered unethical (Homan, 1980) and as the special relationship between researcher and organizational representatives (Holgersson & Melin, 2015; Shani & Pasmore, 1985) demand series of decisions to be made regarding how to ethically progress (Fredberg & Pregmark, 2023). It is possible to think of organizational interventions being done under the action research umbrella in which organizational representatives approve the research being done without being engaged. We use the term collaborative action research—the combination of collaborative research and action research—to be specific about the nature of the research study at hand.

The three case companies were selected based on (1) the potential to get close enough to form a collaborative environment, (2) espoused interest in exploring the role of purpose in innovative work and change processes, and (3) pilots in the pipeline where new ways of working and/or new business models needed to be invented.

This study aimed to understand how a shared purpose influences what happens in a project team when striving to innovate and change in the context of a large organization with multiple stakeholders. Thus, the intervention of integrating a shared purpose as a continuously used instrument to support action in the change process was agreed upon early in the research process. With this overarching aim, the research team conducted the study with an explorative approach to a joint learning journey that evolved collaboratively over time. Thus, as the study progressed, discoveries in the empirical environment influenced our theoretical framework and vice versa (see, for instance, Dubois & Gadde, 2002).

As collaborative action researchers, we believe that we are only to suggest or introduce activities that we consider helpful to the organization (Fredberg & Pregmark, 2023; Schein, 1987). Relevant literature has clearly shown potential for the use of purpose in various ways pertaining to change and innovation (e.g., Andriopoulos and Lewis, 2009; Beer et al., 2011; Gartenberg et al., 2019; Ghoshal et al., 1999; Maria et al., 2010; Pregmark, 2022; Quinn & Thakor, 2019). Hence, we see potential to be helpful to the participating organizations by introducing an enhanced focus on a shared purpose. In this collaborative setup, we saw a rare opportunity to understand how and why a shared purpose affects people, their behavior, and agency for change.

Empirical Environment

In this study, we both worked together with each company, respectively, and created a setup for joint learnings across companies. Thus, the need to form a collaborative environment was not limited to the case companies and research teams but also had to be created between the three case companies. Together with the three organizations, the research team identified interesting pilots (described above) that were about to be launched, where the use of a shared purpose as a mechanism for guiding actions could be of interest. In collaboration with the companies, we outlined a plan for collective and continuous learning of how using shared purpose could influence perceived agency and actions in different phases of the process.

San Siro: Breaking New Ground When Entering Early Phases Together With Stakeholders. San Siro is a company in the construction industry. It focuses on large contracts for the building of, for example, schools, hospitals, roads, and office buildings. Although operating in a global market, it has a strong base in the Nordic countries. One year before the collaboration began, the company's top management team decided on a new corporate purpose. Whereas the previous purpose focused on the work content, the new purpose focused more on being a strong partner through the construction process to secure value for all stakeholders.

The pilot project members had to innovate a way of working with multiple stakeholders from the early phases of the construction process to capture the total value for all stakeholders. While the construction industry is dominated by traditional project logic focusing on time, cost, and quality (mainly from a contractor perspective), the pilot project members attempted to probe how San Siro could expand its contribution to the process by collaborating with multiple stakeholders in the early phases of a project. Early phase collaboration was identified by the management team in San Siro as a business opportunity with untapped potential that had not been explored before. It was clear that this early phase work required innovation regarding work and business models. Moreover, it was a test for activating a new organizational purpose in practice.

Old Trafford: Testing New Opportunities in Previously Unexplored Segment. Old Trafford used to be in the printing business, but as digitalization changed the conditions for printing, Old Trafford transformed into a company primarily involved with in-company production logistics. This shift led to the need to rethink the business processes and governance. A new company purpose was established but had not yet been incorporated to guide activities in the organization.

In the pilot study, they tested ideas on how to use their capabilities to solve business-to-consumer (B2C) issues, a business they had not previously explored. Representatives from top management saw business potential in the consumer segment but were not sure of the ideas to pursue and were confused that this new segment would mean deviation from their current ways of working, existing structures, and strategic priorities.

Wembley: Collaboratively Competing to Innovate Over Business Boarders. Wembley is a holding company that owns multiple businesses, primarily in retail. They had not previously experienced the need for a strong organizational purpose and believed that the purpose statements should only reside in different businesses. However, the financial market, customers, and employees had begun to request clear statements from high-profile holding companies about why they exist and their connected operational guiding principles. The top management team at Wembley welcomed this request because they perceived that they had a strong implicit purpose for everything they had done and invested in.

Their pilot was about engaging coworkers across businesses in an innovation contest, something that had not been done before. They decided to take the chance

to formulate a preliminary purpose for Wembley and to use that draft of a purpose as a guiding star for all the pitches created in the innovation contest.

Study Design

The pilot projects were part of the strategic agenda for innovation. The pilots, therefore, followed the normal innovation cycles and procedures that each company had in place. However, they were not driven by an innovation or Research and Development (R&D) department but as part of a strategic intent to innovate in relation to the core business. The companies had a clear ambition that these pilots should not be top-down ideas, which the teams were merely there to execute. Rather, the top management wanted to challenge the project teams to activate agency for driving both the content and process of the initiatives.

When discussing purpose with the organizations, members of all three referred to purpose as something that was expressed as a meaningful higher ambition—a "why"—rather than financial outcomes or targets/results. The organizations and researchers decided to set up a protocol tailored to fit the specific situation for each company and introduce their respective purposes as instruments for making change happen throughout the process. Thus, each team was asked to use purpose as a starting point for the entire innovation project. Moreover, each team was asked to revisit the purpose continuously during the pilots' progress.

All three pilot leaders claimed that the innovation processes in their organizations were not normally explicitly informed by an organizational purpose but that they were interested in understanding if and how the introduction and strong emphasis on a purpose would make a difference for actions throughout the process.

The process of agreeing on how to create a link to the organizational purpose varied for each organization and pilot:

- In San Siro, the pilot was conducted in connection with other organizations, and a shared total value purpose was developed. This total value purpose was derived from San Siro's brand-new strategy, including a new organizational purpose. The new organizational purpose clearly stated that San Siro was to focus on the entire construction process to create value for all stakeholders. In the first workshop, several stakeholders, both outside and inside San Siro, worked to identify and outline shared ambitions. This shared ambition, along with the overarching purpose of San Siro, was used as the starting point.
- In Old Trafford, the purpose of the pilot was the same as the espoused purpose for the whole company. The company's purpose had been developed as a collaborative process within the organization and formulated as a fairly wide, overarching purpose supporting the transformation from printing to logistics. However, it had not been extensively used as a control/guiding mechanism in Old Trafford previously. Moreover, the purpose had never been used for guiding pilots and definitely not for a pilot aiming to test ideas for B2C businesses. The project team agreed to use the purpose as a starting point for discussion and to adding

"alignment to purpose" to their normal scorecard when evaluating ideas and progression.

- In Wembley, the pilot purpose was a translation of the nonespoused company purpose. Voices had recently been raised that even a holding company like Wembley should be clear about its purpose. This was a request from the financial market, consumers, and employees. The holding company did not have a clearly espoused purpose, but interviews in the planning phase (performed by the research team) with management and employees clearly indicated that a shared sense of purpose existed in the organization. The pilot leader worked with the research team to synthesize the findings from the interviews and proposed a purpose statement for top management. The top management approved and allowed it as a temporary purpose statement that guided the pilot. Thus, in the cross-business innovation contest, all participants had to relate to this tentative purpose.

In all three projects, purpose was explicitly or implicitly linked to the respective organizational purpose. In this paper, we use the term purpose and refer to the purpose that each pilot used to guide the process. That is, for Old Trafford this equated the organizational purpose. Wembley used the recently developed tentative purpose for the whole holding company. For San Siro, where external actors were part of the project team, it meant the agreed-upon project-specific purpose that also captured San Siro's organizational purpose.

Data Collection

We followed the pilot progression over time and gathered data from meetings, workshops, and semi-structured interviews (Table 1). The entire study lasted for 2 years—from planning to follow-up.

Together with the pilot teams, we used a structured method to extract data through continuous cycles of action, reflection, and learning (Argyris et al., 1985; Argyris & Schön, 1978; Edmondson, 2011). In the planning phase, we gathered data through interviews (four in each organization) and workshops (one at each company). Each interview lasted for ~1.5 hours. Each company-specific workshop lasted 4 hours and was conducted at the different company offices. Although the actual content and goals of the pilots were decided solely by the case companies, the setup, process, and intervention to continuously relate to the purpose were jointly designed by the pilot teams and researchers. Thus, in this phase, the research team gathered data about the environment in each company, the planned pilots, and developed the collaborative process as well as the connection to purpose, together with each organization.

In the pilot execution phase, the main part of the work was conducted by the pilot teams. The researchers acted as support for the pilot leader and supported the teams with formats to continuously reflect on the pilot progression pertaining to the purpose. Moreover, the research team kept a learning journal for each initiative, which was shared with the participants and, in turn, created input when planning learning workshops. Ten interviews with each company were conducted to obtain data on

Table 1. Data Collection.

Phase	Data collection	Main actors
Planning/company understanding	12 semi-structured interviews, (4/company) 3 workshops (1/company)	Innovation managers Strategy managers Line managers
Project/pilot execution	Support of each project/pilot (notes in learning journal) 5 workshops across companies 10 semi-structured interviews	Project participants
Follow-up Synthesizing data	1 workshop across companies	Project participants managers

the pilot progression, its impact and relation to the established organization, and its relation to the purpose. Each interview lasted for 1.5 hours.

Furthermore, the research team orchestrated five joint workshops during the pilot execution phase, where the three organizations made sense of learnings and collectively developed ideas. In these workshops, the research team facilitated the conversations, using a simple version of an "after-action review" (AAR) protocol, revolving around questions such as (1) What did we set out to do? (2) What happened? (3) What succeeded/What did not? (4) Why did this happen? and (5) What would you differ from the next time? The questions were intentionally open to help participants openly reflect on their progress and collectively learn from each other about how their actions shaped the outcome. In these workshops, the research team asked follow-up questions about the role of the shared purpose, with a specific emphasis on different parts of the innovation process (see Figure 1). Hence, the action, learning, and reflection cycles were performed at each company as well as in workshops that included all three companies and the research team.

Learnings from each project and the five joint workshops were synthesized into themes (Gioia et al., 2012) in the final joint workshop (facilitated by the researchers) with the company representatives. These themes are displayed in Table 2. The proposed themes were iterated with each company for triangulation (Stake, 1995), fine-tuned, and put in relation to theory by the research team. This iterative work resulted in a proposed model, suggesting how the shared purpose shaped actions and activated change agency in different phases of the process (see Figure 2).

Learnings Created From the Collaborative Setup

We argue that the collaborative set up—with three pilots in three different companies collaborating with each other and with the research team—created impact (MacIntosch et al., 2021) in two domains:

1. Applied learning: continuously developed learning applied in each case to support and improve the outcome of the innovative initiative.
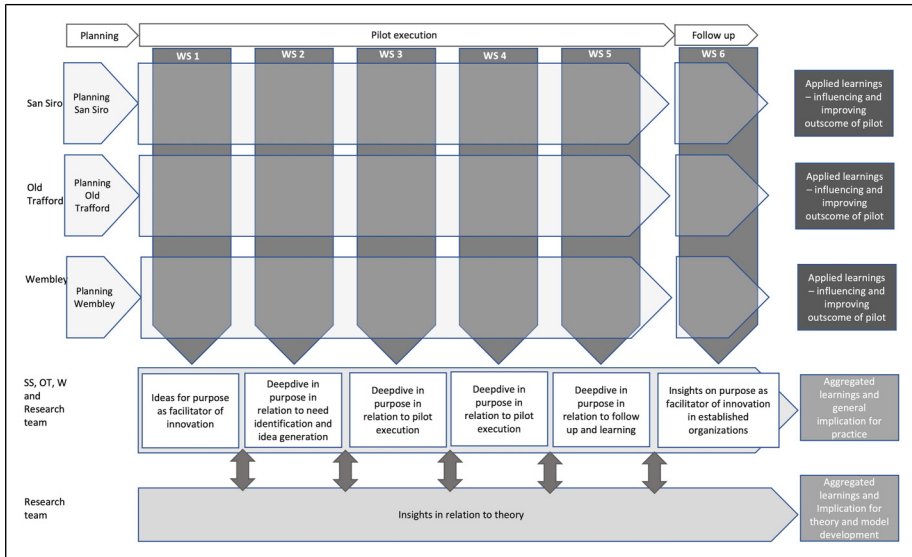
Figure 1. Learnings from collaborative set up.

2. Aggregated learning: focused on (1) implications for practice (learning from all three cases that support practice development) and (2) implications for theory (learning from all three cases that support theory development as an inductive inquiry).

Figure 1 illustrates how the two learning impacts were created through the project, with workshops as the main vehicle for collective learning.

Findings

In all three pilots, the purpose was revisited continuously throughout all phases to test the impact on actions. The leaders and teams of the different pilots worked to keep the purpose alive, shared with stakeholders and used as driver of change in the initiatives and in relation to the established organization. Data from both the interviews and workshops revealed several ways in which purpose could play an important role. The main part of the findings section is dedicated to the data used for the aggregated findings, which will formulate the basis for the discussion and later on the proposed model. First, however, a brief summary of the applied learning for each case company is presented—learnings that were put in action already during the study.

Applied Learnings

In San Siro, the practice of continuously connecting purpose to action made way for a completely new business model and partner processes to emerge. During the pilot, the

team developed a practice for conducting dialogue around the purpose, progress, and principles of collaboration. Moreover, they tested various ideas for charging San Siro's services (in the early phases of the construction processes) to make the business model work in practice. As the project in San Siro also included external stakeholders, they developed principles for creating a shared understanding along with a practice of inviting different stakeholders into a co-creation process in the early stages of their business collaboration. The practices, processes, and business models became established in one part of San Siro and tested in other parts. One manager at San Siro said: "This has not only been a fairly fast pilot, but it also seems like the pilot is at least a bit anchored in the established organization already."

Old Trafford tested the idea of transferring its expert logistics capabilities from the business-to-business (B2B) segment to the B2C segment. "We had great—and challenging—conversations in the early phases of the project. We were excited about the idea, but we got constant pushback from the organization. However, we managed to show that the idea could support our purpose and that it was worth testing," the project manager argued. In the pilot execution phase, the project team developed a protocol to include alignment toward the purpose in the stage-gate model normally used in Old Trafford, along with traditional measures. As the project progressed and the operational and organizational consequences became explicit, the connection to purpose became more difficult to motivate. They still saw potential return on investment in financial terms, but since alignment with purpose was now part of the evaluation protocol, they decided to put the pilot on hold. The project manager described: "We believe in the idea still; however, we realized it would not fit with our purpose and, hence, would not gain traction. Maybe we could still use the idea in a spinoff, but to think about it as a part of our core business will not work."

At Wembley, a holding company, the pilot team was tasked with engaging people from all the daughter companies in innovation. The idea was to conduct innovation contests across all companies in the Wembley family. The pilot started by teasing out a purpose for Wembley (previously without an espoused purpose, but according to the interviewees, it was a fairly apparent implicit one). The pilot team conducted interviews in the organization to investigate how the participatory interest in the contest could be accelerated. They expected rewards (monetary or nonmonetary) to be a big driver of participation—which it was—but also found that the prospect of contributing to something great and meaningful activated interest and engagement. The draft of the tentative purpose served as a guide for the campaign, which was developed to attract interest. Learning from the other two companies in the study, they developed a scorecard that included a purpose component for evaluating innovations. Unfortunately, the pilot/contest was interrupted midway, due to restructuring and following that, new priorities in the management team: "It's a shame really, I think we would have gotten a great number of ideas with the way we were planning this. Moreover, I personally saw this as a chance to test our tentative purpose and develop it further," the project manager said and continued, "We did learn a lot. The purpose gave direction and engagement, and when used properly, it could be a vital instrument for us. However, it also challenges management and maybe we were not quite ready for it."

Aggregated Findings

The aggregated data were sorted according to a simple structure based on common phases in an innovation process: (1) understanding needs/challenges, (2) idea generation and evaluation, (3) pilots/execution, and (4) follow-up/learning.

Understanding Needs/Challenges. The early phase of an innovation process typically involves activities that create a shared understanding of the needs and challenges. In all three organizations, this was normally done primarily by analyzing data regarding market needs, customer problems, and/or organizational issues such as efficiency. However, in the pilots, the needs/challenges were introduced differently. In the early discussions, both in management and different project teams, a clear focus on and use of a purpose—not only for the pilot but also for the organization at large—was a key component. The conversations around organizational purposes began in each management team and were transferred to different pilot projects, as described in the Methods section. Thus, each pilot was guided by a purpose that was directly or indirectly linked to the explicit or implicit purpose of the entire organization.

The data suggest that these conversations about the plan ahead, where the needs and scope were placed in relation to an overall purpose, provided guidance for understanding the challenges in all three organizations. One manager in Wembley stated, "it is a clear untapped potential to understand the innovation in relation to the long-term idea of where our organization is heading." Additionally, in the projects, many participants found discussions about purpose surprisingly rewarding. For instance, as one project member in San Siro expressed "We are not used to sitting down and actually discussing what we want to achieve together. On our first attempt, we found that doing so clarified a lot." In Old Trafford, the project manager was surprised by the level of energy that was created through trying to utilize the newly developed company purpose: "We ended up in discussions that we do not normally have, thinking of how our effort could be the next big thing—not only for us in the team, but for the whole organization, and even beyond that."

In all three initiatives, many project team members expressed how interest and engagement in the project increased rapidly when discussing purpose as a guiding mechanism. As described by one San Siro project team member, "We are used to working with a clearly identified challenge and creating clear measurable targets. I am quite competitive, so it makes me push forward for sure. However, trying to really understand the project in relation to our purpose pushed my commitment and my urge to push harder and do more."

Idea Generation/Evaluation. The interviews indicated that the use of purpose for idea generation/evaluation helped guide the understanding of the future value of ideas, as it provided an extra lens on how value could be created and captured. Such lenses are often absent in regular innovation processes. Two of the organizations (San Siro and Old Trafford) claimed that business potential or return on investment calculations otherwise dominated the idea generation and selection process. The third company (Wembley) expressed that purpose sometimes played a "silent" part in this phase but could benefit

from being further emphasized. As put by a project team member at Wembley, "Well, I think that we all know and feel our values and some sort of a purpose, and I think many people feel strongly about it. So why not articulate it and use its strength?"

Initially, some team members were hesitant to focus on a purpose deriving from the overall organizational purpose in the idea generation phase. In Wembley, for instance, some project team members expressed worry that anything derived from the holding company headquarters, such as purpose, would limit innovativeness and creativity. However, upon discovering that the purpose had to do more with a meaningful "why" than a directive direction, they seemed to reconsider their position. As stated by a project team member at Wembley, "It is easier to find more radical ideas when connecting to purpose, rather than previous knowledge. If we only rely on what we already know, we probably will end up only with improvements, not with something really new." The project leader in San Siro adds a perspective on the value of sharing the purpose with stakeholders outside the organization, "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 be part of striving towards achieving a shared purpose. Stakeholders outside the organization bring a new perspective."

Pilots/Execution. The data clearly indicate that revisiting the purpose throughout the pilot had a positive effect on aligning the project team. A project team member in San Siro explained, "We (project team) come from different parts of the organization and can often have different and sometimes competing goals. Our agreed purpose helped us re-align when someone was going off in a different direction." Another team member in San Siro described a similar situation, "We come from different parts of the organization, and not only do we have different ways of doing things, we have different KPIs; a decision made in the project could benefit one part, but not the other. This was obvious in a team meeting, where we almost fought about the decision on how to move forward. It helped at least a little bit to try to return to the purpose that we all agreed upon."

A question that surfaced when the pilots were launched was whether the purpose could play a part in aligning the innovative work to the established set of resources or systems, especially when the participants shifted and/or came from different organizational units. All project teams worked continuously with the espoused purpose as a tool to monitor progress in relation to established organizations. According to the team in Old Trafford, this work played a major role in improving the alignment between the initiative and the main organization later in the process, although the initiative operationally was at odds with the established way of working. The project leader argued, "When I report about the progress of the pilot to the management team, I start by discussing how we relate to the purpose. When something fails, we can discuss it as learnings regarding what we collectively want to become. I don't know, but my sense is that it helps keep our pilot alive."

All three pilot teams stated that they were surprised by the extent to which the activation of purpose in the pilot execution helped build momentum and engagement within their project teams and in other parts of the organization. For San Siro, they

explained that the purpose was shared with external stakeholders, which seemed to create engagement and open up a solution space.

However, Old Trafford decided not to move forward with the pilot—mainly due to the alignment to purpose. In its early phases, the idea of creating solutions in the B2C market seemed to fit this purpose. However, as the pilot moved forward, the implications of this shift became clear, and the tables turned. Though the pilot showed business potential, the organization would need to operate, do business, lead, and govern differently to make this new business area successful, and when really testing those changes toward the purpose, the organization could no longer motivate the pilot. "The business potential is there, but I think it would be better off in a spinout or in a new company. I could not see the co-workers being fired up about this, not when realizing the consequences," one team member said. The project manager reasoned along the same lines, "Our purpose is very inclusive, when detailing the pilot, we realized that to make it work it would have to be somewhat exclusive."

Follow-up/Learning. All organizations stated that innovations, new working models, and business models often did not diffuse effectively within their organizations. The interviewees and project participants attributed the problem to many factors, such as lack of time, old habits, and poor processes. However, they also described tensions between the innovative teams and the "old" way of working, including cases of the "not invented here syndrome" (Antons & Piller, 2015). Project members from all three organizations argued that the joint purpose in the pilot helped unlock these tensions, fostered interest and learning, and seemed to create a purpose-based alignment between the initiative and the established organization. Moreover, the purpose helps build commitment to innovative initiatives. As described by the project leader at San Siro, "How can you not be interested in a pilot potentially taking us towards a meaningful vision?" At the management level, outside the projects, interview data indicated that communication about the pilot concerning a purpose shared by the established business seemed to spark interest. One manager at Old Trafford argued, "It helps the feeling of playing for the same team."

However, in the pilot teams, there was still hesitation about how much of the pilot results would actually be spread in the organization. A team member in San Siro said, "I think we have more interest than ever, and not so much tension. However, I still have not seen the spread of this outside our business area, which is a shame because it is really good. It might happen, it might not."

In the workshops, it became clear that the company representatives viewed the innovation process as a continuous circle of development and feedback. In the view of the participants in one workshop, an idea might start the process but could also be provoked through the creation of a purpose. As explained by one company representative in a learning workshop, "I think we should use the innovative power to spark the purpose development process." One team member said, "We are trying to innovate in the real world, not in a lab. Who can really say when and where an innovation process starts?" Hence, the purpose could be a starting point that shapes conversations and activities, but a refined purpose could just be an outcome.

Table 2 displays some key quotes that led to the themes that emerged during the coding process, inspired by Gioia et al. (2012).

Table 2. Role of Purpose for Activating Change Agency in Different Stages of the Innovation Process.

Phase	Data (examples of quotes)	Role of purpose
Understanding of needs/challenges	"A clear purpose has helped create a shared meaning, especially when the team is cross-functional" (Project team member, San Siro) "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." (Project team member, San Siro) "It really helped us motivate a project a bit outside our core" (Project leader, Wembley) "Discussing the need with the purpose as a guard rail helped us to see where the energy and potential ideas could be" (Top Management Team member, Old Trafford)	To add a dimension of meaning and direction
Idea generation and evaluation	"When we are working with a shared purpose for the initiative, we are coming up with ideas that are more creative –things that we would not have thought of without asking stakeholders to share the purpose" (Project leader, San Siro) "It is easier to find more radical ideas when connecting to a purpose, rather than past knowledge." (Project team member, Wembley) It seems like more people came up with ideas (Project leader, Old Trafford) 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. (Project team member, San Siro) "It made me want to take one step further and do more. We are about to embark on a journey of creating something important." (Project team member, San Siro)	To open up the solution space
Pilots/execution	"The shared purpose helped keep us on track" (Project leader, Old Trafford) "We (project team) come from different parts of the organization and can often have different and competing goals. Our common purpose helped us re-align when someone was going off in a different direction" (Project team member, San Siro) "I found that so many want to participate in this" (Project team	To encourage continuous alignment and engagement

(continued)

Table 2. (continued)

| Phase	Data (examples of quotes)	Role of purpose
	member, Wembley) "I felt that it was easier to present the project to management – they seemed to trust us to do the right things" (Project leader, San Siro)	
Follow-up/learning	"How can you not be interested in a pilot potentially taking us towards a meaningful vision?" (Top management team member, San Siro) "Not everyone is interested to learn about a new product or process. But hopefully, everyone is interested in contributing to a higher purpose." (Top management team member, Old Trafford) "I have high hopes that this will actually spread." (Project leader, San Siro) "I think many will be interested if we sell this as a story of living the purpose and direction." (Management team member, San Siro)	To create broad interest and facilitate learning
All phases	"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 a new way" (Project team member, San Siro) "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" (Project leader, Old Trafford) "I think that I have never seen so much engagement outside the project team. Even executives outside the unit where we were piloting were interested. I am pretty sure that the way we lifted the aspiration to another level was a key part." (Project leader, San Siro) "I think this is the first time we have actively tried to engage the organizations in the overall aim of Wembley, and it worked." (Project team member, Wembley)	To build shared commitment

Discussion

The study seeks to explore the role of a shared purpose in influencing change agency—the desire of a person or a team "to innovate, participate in, and manage change within and beyond their area of responsibility" (Doyle, 2001, p. 321) involving (1) a willingness, (2) an ability, and (3) permission/encouragement to act. Further, we argue that agency may be latent in individuals and teams and can be activated through managerial action.

The findings from our collaborative work with the teams in San Siro, Wembley, and Old Trafford suggest how a shared purpose could support and activate distributed change agency in several different ways. This could involve, for example, being a vehicle to create cohesion and efficiency within a pilot and being a positive force for integration and interplay between the pilot and the established organization. Figure 2 depicts how purpose seems to play an important role in activating agency in relation to different phases in the process.

Role of Purpose for Activating Change Agency

The role of purpose for supporting change agency can be grouped into five themes, as outlined in the Findings section (see also X, Y, Z, V, and W, location markers in Figure 2). These seem to apply to different phases of the innovation process, as shown in Figure 2.

Add a Dimension of Meaning and Direction (X). Members of the three pilots described that they saw potential in connecting the innovative work to the general direction of the organization and explained how it added a dimension of meaning. This seemed to create the foundation for psychological alignment (Beer, 2009) between the intent of the innovation and the established organization. The project manager at Wembley stated, "It really helped us motivate a project a bit outside our core." This could complement the current understanding of the process of identifying the "job to be done" (Christensen et al., 2016). The idea of bringing people together to strive for something
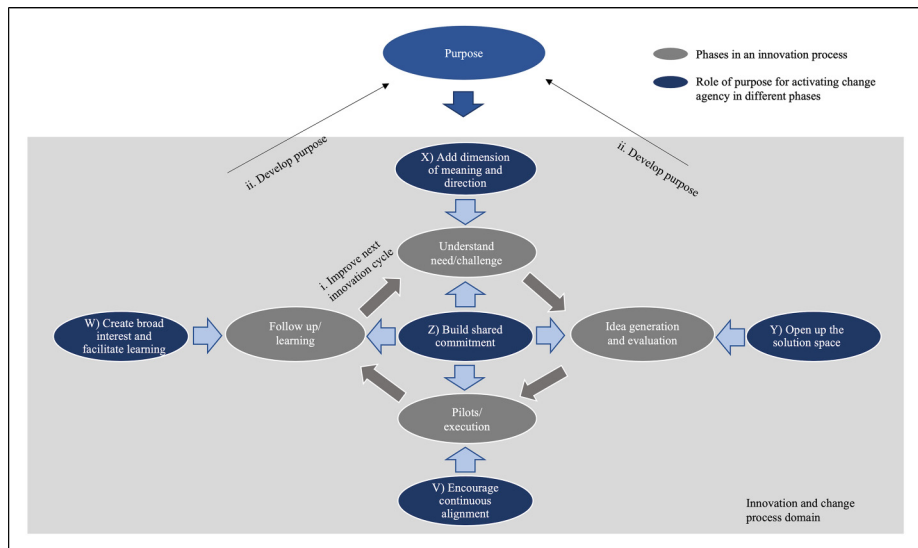
Figure 2. Conceptual model for the role of purpose for activating agency.

meaningful to support change has been discussed in the literature before (Fredberg & Pregmark, 2018). Other studies have focused on the important function of purpose in providing clarity of direction (Gartenberg et al., 2019). In this study, we see clear indications that purpose played a role by helping with a sense of meaningfulness that promoted distributed change agency (Buchanan & Badham, 2008; Balogun et al., 2005) and engagement from stakeholders both within and outside pilots. The change agents driving these pilots reported how the purpose was used as an important tool to create agreements and enlist support from stakeholders in organizations. This parallels the role of creating productive teams, as described by Amabile and Kramer (2011).

Open up the Solution Space (Y). With a shared purpose as a construct for opening up the solution space, ideas seemed to be generated on a higher level. Bonchek (2016) discussed a shared purpose as a guide for decision-making, arguing that it is the first step in supporting a leader to let go and delegate without losing control. The logic is that the control mechanism is purpose-based trust, rather than administrative control or a price mechanism (Adler, 2001). Hence, with a shared purpose, organizations can allow ideas from several places within (or outside) the organization. This logic is consistent with this study's findings. In one of the companies, the shared purpose seemed to spur innovative ideas not only from members of the pilot team but also from collaborators and customers, supporting more actors in developing change agency and participating in the innovative work. Arguably, change agency plays a role in innovation by enabling actors to participate and act in many ways, such as designing solutions. The advantages of purpose-supporting commitment from members of the organization and other stakeholders have been discussed previously (Bonchek, 2013). This study adds to the discussion by pointing toward the role of purpose for opening up the solution space for innovative ideas, while maintaining the connection to the established organization.

Encourage Continuous Alignment (V). A well-known theme when discussing change and innovation in established organizations is the potential tension between alignment and adaptability (Birkinshaw & Gibson, 2004). Continuous alignment becomes increasingly important as innovation initiatives move into the integration and implementation phases. In one case, the use of progress meetings, where connection to the agreed purpose was a key point, seemed to have had an impact on the way the initiatives were run, providing both direction and freedom. Purpose has been described as a high-level solution to release tension and as a unifying construct between exploration and exploitation (Fredberg & Pregmark, 2018). The findings of this study place purpose closer to the actual practice of change agency in cases characterized by a need for ambidextrous solutions to simultaneously engage in both explorative and exploitative activities.

Create Broad Interest and Facilitate Learning (W). The data indicate that purpose can play a role in creating broad interest and facilitating learning, since it could present a means for translating specific details to a shared domain common to the entire organization. This is in line with previous research advocating that change agency could be

linked to capabilities such as listening and learning (Buchanan & Badham, 2008; Charles & Dawson, 2011).

Purpose facilitates the establishment of the part–whole relationship that is critical for the pursuit of innovation (Van de Ven, 1986) and constitutes a kind of learning mechanism (Docherty & Shani, 2008) similar to a strategic intent that facilitates dialogues and knowledge creation about how to pursue change (Fredberg et al., 2011). A similar argument is made by Liedtka and Rosenblum (1996), who state that a shared purpose or vision can help facilitate difficult conversations in an organization to support the learning process. In the cases studied, data point toward that learning was aided by commitment and interest created by a shared purpose. It seems that a shared purpose could be a way of releasing the tension between the established way of working and innovative work. Hence, a joint purpose could facilitate broader agency (Buchanan & Badham, 2008; Balogun et al., 2005) in situations where the organization aims to create contextual ambidexterity.

Build Shared Commitment (Z). A shared purpose within an organization potentially creates a strong direction (Beer, 2009). By making a clear connection between specific initiatives and their overall purpose, it is reasonable to believe that a shared commitment to the direction translates to the initiative. Moreover, learning outside the project team and its closest environment can be facilitated if the purpose is shared and meaningful to multiple stakeholders (Beer et al., 2011). In this case, it could be hypothesized that a shared purpose could be a factor in preventing classical problems with transferring innovation to other parts of the organization and releasing the tension between alignment and adaptability contextually.

Innovation Process as a Circular Interplay With Purpose to Facilitate Change (ii)

The proposed model suggests that innovation processes could and should be viewed as circular processes (see ii in Figure 2), where learning from innovative work influences not only the next innovation cycle but also the overall purpose of the organization. This adds to models suggesting that the actual innovation or realization of the innovation is the main outcome of an innovation process (Blank & Newell, 2017), by indicating additional outcomes—such as input to strategic work and influence on the organizational system, as previously discussed by Fredberg and Pregmark (2018). Liedtka and Rosenblum (1996) claim that a shared purpose or vision shapes conversations that align with our findings (conversations here being regarding innovative initiatives). Our findings also seem to indicate the reversed logic—the innovative work/pilots can shape and develop purpose. Arguably, deliberate connection to purpose could not only help the innovation/change process at hand but also be part of activating agency in a continuous intentional change journey (Emirbayer & Mische, 1998). We therefore suggest that the use of purpose could be a component in developing a practice around a distributed change agency, as called for by Balogun et al. (2005).

Role of Collaborative Action Research Process for Activating Agency

This collaborative setup provided the three participating organizations with feedback, ideas, and direct learning. As suggested by several proponents of collaborative approaches (Coghlan & Shani, 2014; Shani et al., 2007), investigation in this field could be beneficial for both research and practice. We argue that the setup with three organizations in a facilitated learning environment accelerated learning. Moreover, the project participants seemed to gain confidence in the data from their respective projects, indicating the benefits of purpose, when discussing it with peers and not only researchers. This, in turn, seemed to create more agency to champion change.

We saw significant progress in each project during the entire study and could follow how processes and practices based on joint discussions were tested in the pilot work. Wembley and Old Trafford were not completely successful, although both organizations clearly stated and demonstrated how knowledge was used in other areas. In San Siro, the pilot was successful, and an innovative business model solution was integrated into the core business of that particular area. The whole pilot team clearly stated that the collaborative process with both peer organizations and researchers and the introduction of purpose as a key construct (Bonchek, 2013) formed the basis for the success of the initiative and also for the integration of the initiative in the business organization.

Transferring the results of the pilot to other business areas proved difficult, however. This may indicate that participating in a purpose-driven process is as important as the shared purpose as such. San Siro did not give up, though. In an effort to build on the success of this initiative and continue to develop innovative business models for the whole organization in collaboration with academy, San Siro granted an executive involved in this study a fully financed opportunity to pursue a PhD together with parts of the author team. We see this as a manifestation of a collaboration with constant learning at the scholar–practitioner interface.

If the organization nurtures an ambition to create contextual ambidexterity, i.e., to succeed both with innovation and driving current operations in the same structure, then the integration process taking place continuously as the innovation initiative develops will be at the epicenter of paradoxical tensions. As mentioned in the theoretical background, authors have pointed out the importance of a higher-level solution, such as a purpose, to handle these issues. For example, purpose is key for reconceptualizing the problem (Poole & Van de Ven, 1989) or work as an arbiter of decisions (Quinn & Thakor, 2019), which is particularly effective if the purpose creates clarity for middle managers, who typically are in charge of adapting operative decisions to the purpose and long-term strategic direction (Gartenberg et al., 2019). The results in this paper show how purpose played this role by activating agency in different ways through an innovation process. Purpose here creates a tapestry of learning mechanisms—organizational elements that foster requisite learning processes (Fredberg et al., 2011; Shani & Docherty, 2003) both internally in different departments and across departments. As a purpose-activated agency, it impacted the organization in multiple ways. Building on Fredberg et al. (2011) and Shani and Docherty (2003), it

had an effect on how organizational processes were run (procedural learning mechanisms), how the teams working with innovation and the teams in the main organization interrelated (structural learning mechanisms), and not least how decisions needed to be taken by a reconceptualization of the issues at hand (cognitive learning mechanisms).

It is important to note that the introduction of purpose as a learning mechanism allowed leaders in the organizations to engage other organizational members in the learning process. We found the purpose to enable leaders to collectively engage in a process of finding out how the paradoxical tensions can be resolved and take action. Being able to repeatedly use purpose as a learning mechanism therefore arguably constitutes a dynamic capability (Schoemaker et al., 2018; Teece, 2007) which may be most critical in situations where the organization is faced with complexity problems such as ambidexterity (O'Reilly & Tushman, 2008).

Such learning also results from the collaborative inquiry process in which both internal and external people are involved. One common perspective of change agents in the research on organizational change is that of external organizational development consultants (e.g., Armenakis & Bedeian, 1999; Caldwell, 2003). This study focuses on how change agency can be distributed and enabled beyond traditional change drivers. As collaborative researchers, we were external actors in the participating organizations and have been part of initiating change regarding the role of purpose in the innovation process as well as setting up a structure for learning within and between organizations. Hence, we were part of a circle of actors with change agency. Our ambition was not primarily focused on changing the organization, however, although we deliberately had an impact that we believed would be positive for the organizations. We engaged in a collaborative research process supporting the teams in the pilots and tried to learn about the role of purpose during change and activate change agency. Thus, our role as collaborative researchers was dual with regard to agency: helpful to the organizations and support to the collaborative learning.

Establishing a tapestry of collective learning mechanisms across organizations and between external agents (such as researchers or consultants) based on a joint purpose may become increasingly important when the pace of, for example, technology or industrial transitions is high. Being able to productively engage in a collaborative inquiry process (a learning mechanism in itself) to learn, for example, about the new conditions that need to be taken into account, or the new potential of organizational resources potentially, becomes a key dynamic capability with significant value for organizational survival.

Contribution

Contribution to Theory

The academic contribution of this paper lies in the developed understanding of the role of a shared purpose for activating change agency (Buchanan & Badham, 2008) and, second, in the suggestion of how distributed change agency can enable innovative change-related work within an established organization (Gibson & Birkinshaw,

2004). We contribute to the literature on agency by shedding light on how a shared and continuously revisited purpose encourages change in actions in different parts of an innovative process. We believe that the suggested model could be a starting point for developing practices around activating change agency for coworkers in nonmanagerial roles, as suggested by Balogun et al. (2005).

We speculate that a significant difference in purpose between the established organization and innovative initiatives, or a lack of an amalgamating dialogue, could become a cause of failure in attempts to create contextual ambidexterity. This study connects known contextual ambidexterity challenges, such as management attention and tensions between explorative and exploitive work, to the importance of supporting change agency in both lines of work. To our knowledge, not much has been published about the connection between change agency (Balogun et al., 2005; Buchanan & Badham, 2008) and contextual ambidexterity (Pregmark, 2019; Gibson & Birkinshaw, 2004).

Furthermore, this study strengthens the idea that a shared purpose can support innovation, thereby helping to handle a complex business environment and respond to disruptions (Johansen, 2017). It unpacks the specifics of the role purpose can play in different phases of innovation, extending findings on the importance of a shared purpose (Maria et al., 2010). This study also contributes to the discussion on innovation as a strategic tool that both influences and is dependent on, direction.

The study also demonstrates how collaborative action research can contribute to both theory and practice, as discussed by Shani and Coghlan (2021a) and Coghlan and Shani (2014). We contribute to the literature on collaborative research approaches by identifying a set of key aspects of engaging in processes with multiple organizations. Previous research has stressed the importance of learning at the scholar–practitioner interface (Beer, 2013, 2021). In this study, representatives from all three organizations described the collaboration between the research team and the organization as important, but interactions with other organizations were a key accelerator of learning concerning input, sensemaking, and agency. The collaborative setup with the three companies helped assure relevance by generating more close-up data, accelerating sensemaking, and helping to create rigor in the output, strengthening the contribution to theory regarding questions with a high degree of organizational relevance (Gioia et al., 2012; Prahalad, 2011). Moreover, the collaboration between peers helped generate actionable, immediate knowledge that the participating organizations could apply and test within the scope of their respective projects. The collaborative inquiry setup and the work with a purpose could both be said to constitute learning mechanisms (Fredberg et al., 2011; Shani & Docherty, 2003) that becomes increasingly important when organizations need to explore an uncertain and ambiguous territory.

The study focused on three pilots driven in established organizations, where we as collaborative action researchers helped create the special setup of a continuously revisited purpose during the whole change process. The arguably very different character of the organizations strengthens our belief that the results can be transferable to others and hence be valid in a broader setting. The current study has not, however, allowed us to identify the borders of that validity. Such an attempt would necessitate a larger set of organizations with a higher degree of variability of contextual factors.

The study was aimed at investigating the role of purpose for activating change agency. Though we argue that this was a key determinant, the mere fact that the organizations gave more managerial attention to the initiatives of course also possibly influenced change agency. We hence cannot determine that the purpose intervention was the sole activator of agency and the following activities and reflections. We do, however, see strong indications for purpose having a substantial impact since activities, conversations, and reflection shifted—both according to the participants and to our observations.

As action researchers, we have been a part of shaping the activities and thereby influenced the course of action that created the outcome of the study. This was in line with our research ambitions where we set out to be helpful (Fredberg & Pregmark, 2023) and support the organizations in doing a natural experiment to understand how a focus on purpose would influence change agency and thereby the change and innovation process. Our research partners in the three organizations were also part of influencing each other's work.

Contribution to Practice

In a fast-moving world, planned and incremental change driven as central initiatives is insufficient, and the agency for change arguably needs to be distributed. Purpose seems to play a major role in achieving ambidexterity by combining alignment and adaptability (Gibson & Birkinshaw, 2004), adding value in all stages of the innovative initiative. Such activated agency is thus especially important in cases where a company aims to achieve contextual ambidexterity (Gibson & Birkinshaw, 2004). This study purported to encourage organizations to develop and take advantage of a meaningful and shared purpose as a mechanism for activating change agency. The model and proposed domains of agency effects of purpose in different parts of an innovation process can potentially be used to help organizations design their purpose-led efforts and accelerate their journey from perceived needs to integrated innovative solutions. Further, we argue that purpose not only activates agency but also supports an organization in handling contextual ambidexterity.

We stress the importance of continuously discussing and aligning the purpose within a change/innovation team and of encouraging purpose alignment discussions and actions with other stakeholders inside or outside the organization.

Our hope is that this study and the proposed model could serve as a building block for creating a process and practice for approaching innovative projects through the lens of contextual ambidexterity, where the different domains could be inputs to an agenda for a series of conversations that need to happen to activate agency.

Declaration of Conflicting Interests

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