

## PART II

# ORGANIZATIONAL DYNAMICS FORMING AND DISSOLVING COLLABORATION



## CHAPTER 5

# INSIDER ACTIVISTS PURSUING AN AGENDA FOR CHANGE: SELLING THE NEED FOR COLLABORATION

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### ABSTRACT

*While inter-organizational collaboration concerns processes of organizing between firms, it is always initiated and enacted by individual people who perceive a need for collaboration. This chapter takes the perspective of these actors and their efforts to seek collaboration as they pursue an agenda for change. Collaboration processes are thus conceptualized as path creation and internal strategizing. The chapter focuses specifically on how actors sell the need for collaboration internally and how they draw on their external network to promote change. It illustrates this process of issue selling and collaboration with six case studies in the area of new product development, new forms of network governance, and network-wide change of business practices. Comparing these more or less successful trajectories highlights the relevance of the relational context in issue selling, the role of intentionality within emerging processes, and interplay between external collaboration and internal strategizing.*

**Keywords:** Issue selling; strategizing; path creation; serendipity; relationality; inter-organizational collaboration

## INTRODUCTION

It was a good idea for the patients, it was good for the professionals, it was good financially, it was good for the hospitals. And yet it took so many hours of discussions and frustration – I still don't understand why. (Gynecologists initiating a network for cancer care, cited in Patru, 2017, p. 10)

This chapter focuses on the proactive efforts of individual actors who initiate inter-organizational collaboration in an attempt to pursue an agenda for change. It, thus, addresses the “backstage interpersonal dynamics” (Ring & van de Ven, 2000, p. 179) that accompany and often precede formal contractual relations. It sheds light on the day-to-day activities of people at different levels of the organization, thus complementing the tendency to focus on the organization as the principal level of analysis in inter-organizational research (Marchington & Vincent, 2004).

These insider activists are driven by their conviction that collaboration is essential to achieve a goal that they regard as strategically important for their organization, yet find themselves in an internal competition against other strategic initiatives. In this marketplace for strategic ideas, change efforts are contested with multiple perspectives on what is required and desirable (Buchanan & Dawson, 2007; Dutton, Ashford, O'Neill, & Lawrence, 2001). In order to gain attention and resources for their inter-organizational collaboration efforts, actors attempt to shape the internal strategic landscape. While such efforts to shape the strategic agenda have mainly been studied as processes internal to the organization under concepts such as strategizing (Jarzabkowski, Balogun, & Seidl, 2007) and issue selling (Dutton et al., 2001), more recent research points to these internal processes being interlinked with inter-organizational collaboration. Deken, Berends, Lauche, and Gemser (2018) showed that for novel, complex project external collaboration may be necessary to even define which resources might be needed and can therefore precede internal strategizing.

The issue selling literature has broadened its scope to include lateral influencing and issues beyond firm performance (Sonenshein, 2012). A prime example is issue selling regarding social and environmental concerns (Alt & Craig, 2016; Bansal, 2003; Howard-Grenville, 2007; Sonenshein, 2009; Wickert & de Bakker, 2018). While actors attempt to change their own organization, they also connect to a social movement beyond the organization via the common narrative of sustainability and social justice (Blazevic & Lauche, 2018; Gehman, Trevino, & Garud, 2013). Many other issues that actors attempt to address from their professional perspective inherently require external collaboration because resources need to be pooled across organizations. Similarly, attempts to “change an industry” by strengthening the role of a particular professional group whose insights are deemed necessary to improve the overall collective effort require issue selling across organizational boundaries.

This chapter aims to unpack how such influencing efforts shape the early stages of inter-organizational collaboration. My involvement as a supervisor

and co-author in a number of field studies on inter-organizational collaboration and as convener of a series of conference subthemes with a focus on process-oriented, practice-based research has alerted me to these actors who almost by accident become alliance managers. Their actions were clearly driven by intention but rather unaware of the complex and longwinded journey ahead of them. None of the cases was a matter of a top-down implemented alliance but rather of collaborative efforts of middle managers, professionals, or shop floor workers to deal with an issue that had arisen in their work. Gynecologists responded to government policy that treatment for rare diseases should be consolidated (Patru, 2017). Aftercare personnel came into the hospital whose patients they took on to educate nursing staff about the transfer procedures after the transfer nurses had been dismissed (Patru, Lauche, van Kranenburg, & Ziggers, 2015). A group of managers followed a hunch that big data on vehicle usage could be turned into innovative services and help reduce internal costs (Deken et al., 2018). Architects were frustrated with their diminishing role in the design and realization of building projects and began to trial new forms of project governance (Liefink, Smits, & Lauche, 2018). Human factors specialists from different organizations joined forces in the hope to raise the awareness of psychological and organizational factors that contribute to accidents and near misses in drilling operations (Verweijen & Lauche, 2018).

While the mainstream literature typically frames inter-organizational collaboration as a matter of strategic choice, the emergent picture for me was one of effortful accomplishment (Pentland & Rueter, 1994) and of bricolage (Garud & Karnøe, 2003). Like Chia & Holt's (2009) example of the cyclist Graeme Obree, these actors started with a clear sense of devotion to their object but no grand plan where they were heading – their strategy was “wayfinding” and making do with unexpected turns and new opportunities, often relatively blind for the institutional intricacies that they were letting themselves in. As actors began to better understand the institutional complexities of their endeavor, they began to learn the rules of the game. Those who persevered built coalitions and made systematic efforts to get other actors on board.

I believe that understanding inter-organizational collaboration from such a micro-perspective of the internal activists is useful, as it helps to make sense of the zigzag course of collaboration as the towing and throwing between actors who navigate different rationalities and monitor their collaboration partners to sense which level of sharing and collaborating is appropriate in any given moment (Jarvenpää & Majchrzak, 2016). Such a micro-perspective illustrates the hurdles that actors go through and shows the effort involved in “artful integration” (Suchman, 1995). The chapter compares six cases: a more and a less successful one for three different types of collaboration aims, thereby identifying strategies that appear to be more suitable for creating momentum for collaboration. The evidence examined for this chapter suggests that actors often underestimate the political struggle and the perseverance required and that those who more consciously embraced the need to sell their issue were more successful.

## PATH CREATION FOR INTER-ORGANIZATIONAL COLLABORATION THROUGH ISSUE SELLING

This chapter addresses inter-organizational collaboration from the perspective of creating “collaborative advantage” (Huxham, 1993; Huxham & Vangen, 2005) by bringing together knowledge, actors, and various forms of technological and financial resources to accomplish a goal that would not be achievable from the perspective of a single organization. The generic definition of inter-organizational collaboration as the pooling of resources by two or more organizations that work on issues of mutual interest (Gray, 1985) remains valid. Actors outside of senior management who reach out beyond the boundaries of their organization to pursue change may be more focused on gaining legitimacy (Oliver, 1990), but like firms as a whole they are interested in access to critical external resources (Ahuja, 2000; Hitt, Ireland, & Lee, 2000). Such resources can include complementary knowledge and technologies (Teng, 2007) needed for strategic goals such as innovation and change (Davis, 2016; Sydow, Windeler, Schubert, & Möllering, 2012).

If the change effort concerns novel, complex problems, collaboration may be required to even understand the nature of the problem and to make sense of the strategic challenge (Seidl & Werle, 2018). For such multidimensional meta-problems (Emery & Trist, 1965; Hardy, Lawrence, & Phillips, 2006) such as sustainable development, collaboration is essential, as the issues transcend the boundaries of the organization. Meta-problems have complex ramifications that affect a broad range of stakeholders from consumers to suppliers and local communities. For example, collaboration is required to identify and address social and environmental issues in the supply chain (Ashby, Leat, & Hudson-Smith, 2012) or to create new opportunities to use waste streams through industrial symbiosis (Paquin & Howard-Grenville, 2013). It is this sense of necessity that drives actors to pursue inter-organizational collaboration against the odds. Although the majority of alliances fail, it is possible to bring diverse stakeholders together through forms of collaboration that allow for robust action (Ferraro, Etzion, & Gehman, 2015).

The growing body of process literature on inter-organizational collaboration has made the case that initiating and setting up collaborations is a nontrivial endeavor and far more iterative than previously acknowledged (e.g., Ariño & de la Torre, 1998; Doz, 1996; de Rond & Bouchikhi, 2004; Manning, 2010; Sydow, 2004). The classical alliance literature had described collaboration as a rational process of selecting partners based on complementary resources required to accomplish the firm’s strategic goals (Eisenhardt & Schoonhoven, 1996; Teng, 2007). There is ample evidence that this teleological approach insufficiently captures why alliances are so difficult to start and why they so often fail. de Rond and Bouchikhi (2004) have highlighted the emergent character of alliance formation from a dialectical perspective. Their empirical example also illustrates the role of serendipity and chance encounters. Through their very nature, innovative endeavors often emerge and evolve as they are being developed (Farjoun, 2002; Lê & Jarzabkowski, 2015; Mintzberg & Waters, 1985).

Most studies assume that strategy formation precedes collaboration or take strategic motivations for inter-organizational collaborations for granted

(e.g., Ring & van de Ven, 1994). A few process studies investigated the initiation phase of collaboration, primarily focusing on the emergence of relations (Berends, Van Burg, & Van Raaij, 2011; Manning, 2010), and the evolution of negotiations and agreement structures (Ariño & Ring, 2010; Faems, Janssens, Madhok, & Van Looy, 2008). Yet in situations of high novelty and interdependence, and it may be impossible for actors to determine *ex ante* what they actually need from external partners (Deken et al., 2018). In such cases, the internal process of strategizing is likely to be intertwined with exploring possible options for collaboration.

Yet the question is not simply a matter of the “planned versus emergent” debate: while process researchers have questioned the conventional design perspective that assumes strategy is based on the prior conception of plans (Chia & Holt, 2009), from the perspective of the actors initiating collaboration it is indeed a matter of deliberate intention and purposeful goal-oriented behavior. From their position as peripheral actors, they contribute to strategizing in a bottom-up fashion (Mirabeau & Maguire, 2014; Regnér, 2003) and iteratively advance initiatives (Burgelman, 1983; Kannan-Narasimhan & Lawrence, 2018; Noda & Bower, 1996). They may not have a great game plan – Ferraro et al. (2015) argue that actors can pursue a strategy of robust action without knowing in advance how to proceed if they use experimentation and attend to the multiple voices of other actors. So while on the firm-level strategic success may be “an indirect and unintended outcome of everyday coping actions and embedded local opportunism” (Chia & Holt, 2009, p. 9), for those doing the coping there is still method in the madness. Two questions arise: how can actors advance their collaborative purpose and what makes their bottom-up strategizing more likely to succeed.

### *Bricolage, Wayfinding, and Path Creation*

If inter-organizational collaboration is initiated by actors outside senior management, it cannot rely on the authority, legitimacy, and resources that more powerful actors may be able to command. Actors have to make do, they start and try out different strategies, which may or may not work – they are experiments rather than errors as there is not preexisting benchmark for mistakes: “any action is a probe into the world even as it is being created” (Garud & Karnøe, 2001, p. 7). Some of these

actions that may appear peripheral or tangential to the primary concerns of a strategic situation can ... turn out to be more efficacious in bringing about desirable and sustainable outcomes. (Chia & Holt, 2009, p. 24)

Various authors draw on Levi-Strauss’s (1962) concept of “bricolage” to describe these trials and resourceful improvisations. Chia & Holt (2009) use the example of the self-made cycling top athlete Obree who succeeded against the odds through enduring effort and who “not only made do with what he found but who had the *savoir-faire* to experiment with alternatives when more obvious tools were already available” (Chia & Holt, 2009, p. 177). They propose the term “wayfinding” for strategizing efforts that try to create a new position by relating differently to what they find.

While their example might suggest bricolage is an individual effort, Garud and Karnøe (2003) emphasize emergent co-shaping and the “hands-on” quality of the actors’ interactions with the technology-in-the-making and with one another. In their study on the emergence of novelty in the wind turbine market, there were small Danish companies with modest resources who collaborated with other actors in their ecosystem and, thus, managed to set processes in motion and actively shape emerging social practices and artifacts, rather than the US companies with superior resources who aimed for the big breakthrough. They coin the term “path creation” as the mindful deviation from the structures one is embedded in (Garud & Karnøe, 2001; Garud, Kumaraswamy, & Karnøe, 2010), a conceptual leap that prioritizes agency while still acknowledging the institutional processes at stake in path dependence. Entrepreneurs disembed out of their day-to-day activities to create novelty but cannot deviate too much without risking counter-reactions that could thwart their efforts. This mindful deviation allows them to mobilize rather than alienate constituents of their technological field. As the empirical studies will illustrate, what Garud and Karnøe found for entrepreneurs can also be said for other actors who pursue inter-organizational collaboration.

### *The Need for a Relational Approach*

The drive for deviation can come at a price:

those who can muster the enthusiasm and mindset to depart from existing embedding structures may be so enthused by the act of insight that they begin pursuing it with a single-minded purpose. In doing so, they are likely to disregard feedback others may provide, and thereby miss out on an opportunity to mobilize others. (Garud & Karnøe, 2001, p. 10)

Mobilizing others depends on being mindful about the relations to others who might be supportive if they can relate to the cause.

In Emirbayer’s (1997) conceptualization of relationality, agency is always a dialogical process through which actors interact with the surrounding persons, places, meanings, and events. While Emirbayer’s manifesto represents an academic’s worldview, evidence suggests that actors who embrace such a relational perspective area more successful in reaching out to others. In Howard-Grenville’s (2007) study at ChipCo, 11 environmental specialists who endeavored to convince their 1,500 engineering colleagues about the relevance of environmental issues were most successful when they were able to bridge the difference and dependence in knowledge (Carlile, 2004; Carlile & Rebentisch, 2003); in other words, when they were able to offer their concerns as a relevant and accessible contribution for the technology developers. In an inter-organizational setting, Deken, Carlile, Berends, and Lauche (2016) also found that members of a strategy team had to engage with the dynamics of the interdependencies as they tried to initiate collaboration with external service providers. The company’s procurement routines were not set up to deal with the degree of deviation and novelty the strategy team envisioned, and it required considerable routine work to flex, stretch, invent routines in interaction with colleagues from purchasing. Both examples illustrate that path creation also involves active attempts to convince others and “sell” the need for a collaborative approach.



### Issue Selling

Issue selling is the process by which actors outside senior management attempt to convince others of the strategic relevance of an issue (Dutton & Ashford, 1993; Dutton et al., 2001). The more recent focus on social issues has broadened the scope to include lateral influencing and issues beyond firm performance (Sonenshein, 2012). Social issue selling specifically focuses on organizational change regarding social and environmental concerns (Alt & Craig, 2016; Bansal, 2003; Howard-Grenville, 2007; Sonenshein, 2009; Wickert & de Bakker, 2018).

Empirical studies in different contexts have examined how actors attempt to promote the relevance of social concerns and create momentum for change in their organizations from a position that requires “convincing without coercion” (Wickert & de Bakker, 2018). Dutton et al. (2001) investigated successful and unsuccessful accounts of issue selling in a hospital context and identified different types of moves: *presentation moves* such as using the logic of a business plan or making continuous proposals, *bundling moves* that connected the issue at hand with other established goals such as profitability, market-related issues or the concerns of key constituents, *involvement moves* such as using formal structures or keeping the boss informed, and *process moves* such as a sense for the right timing.

Issue sellers access resources by “draw[ing] on their limited assets to make moves that enact recipient’s schemas ...triggering their attention and action on the issue” (Howard-Grenville, 2007, p. 563). The environmental engineers in her study asserted formalized decision processes and took control to advance decision processes when it was possible to rely on existing procedures to advance their goals. They resorted to appealing to commitments and offering explanations to convince their recipients and pragmatically worked within constraints to accommodate internal limitations. As in Dutton et al. (2001), they provided data to substantiate their agenda and illustrate impact on performance. Wickert and de Bakker (2018) show that corporate social responsibility (CSR) officers go to great length in “taking away fear of change” and “showing that there are not only risks but also chances” (p. 57). They established proximity by engaging in dialogue, creating emotional attachment, and adapting to the issue recipient’s worldviews.

So far, the issue selling literature has focused on change processes inside organizations, while at least for some issues their very nature inherently requires inter-organizational collaboration with various stakeholders (Ferraro et al., 2015). Sonenshein’s (2012) proposal of issue selling as a linking concept between the individual change agent, the organization, and society offers a connection to the work on grand challenges and social movements. Of particular interest here is the role of issue selling in the early phases of initiating collaboration and strategy formation. Issue sellers may seek collaboration with external parties to pursue their goals and attempt to sell its strategic relevance to obtain approval to formalize the collaboration, or they may utilize their external network in more informal ways as an example of desirable business practices or as a pressure group. As much as setting up inter-organizational collaboration requires selling its relevance internally, many issues require collaboration beyond firm boundaries. In particular for actors who are not in position of formal authority, selling issues such as CSR and sustainability becomes a matter of “convincing without coercion”

(Wickert & de Bakker, 2018). The aim here is to explore how such actors pursue path creation in complex, partially unpredictable setting and how they mobilize others to create momentum for their issue.

## EMPIRICAL ILLUSTRATIONS

To illustrate how actors use issue-selling strategies to initiate collaboration, I examine six case studies that I investigated as an author or co-author with different degrees of involvement in the field. The cases cover different contexts with increasing degrees of complexity of collaboration issues: (1) new product development, (2) new forms of network governance, and (3) network-wide change of business practices. For each context, I selected a case with a more successful and one with a less successful trajectory.

In all cases, we studied actors' moves for change as they attempted to set up collaborations. We used a combination of meeting observations recorded on video or audio tape and/or field notes, interviews with core actors across organizational boundaries and document analysis of evolving strategy documents, meeting minutes, presentation material, and, in some cases, email communication (see Table 5.1). While I selected cases that exhibit issue selling and inter-organizational collaboration, these concepts were not always at the theoretical forefront of the original studies. Rather than attempting a comprehensive analysis of all data, I am drawing on these cases to provide empirical evidence of the effect of different strategies.

As I analyzed how actors pursued their goals and compared their strategies across the cases and against the literature, a number of dimensions emerged. Strategies differed in terms of what and who they were directed at (see Table 5.2). Some strategies were mainly aimed at gaining internal recognition of the relevance of the issue and actors used similar strategies as in the extant issue selling literature (Dutton et al., 2001; Howard-Grenville, 2007). A second set of strategies aimed at reaching out to potential external partners to help define internal strategy. These involved both drawing on serendipitous encounters (de Rond & Bouchikhi, 2004; Garud & Karnøe, 2001) and utilizing external expertise to clarify the goal of the collaboration. The third type of strategies related to building on an external network to create momentum externally and internally, as had been found in the literature on selling issues of the common good, such as CSR and sustainability (Blazevic & Lauche, 2018; Ferraro et al., 2015; Wickert & de Bakker, 2018).

### *Case 1: Product Development with External Expertise*

The first two cases both took place in the context of new product development. The focus was on gaining internal legitimacy for the proposed innovation, and on connecting with external network to define strategy. In Case 1, an internal strategy team at AutoCo started from the strategic hunch that data from their vehicles could be used to develop new services that would create customer but

**Table 5.1.** Overview of Cases.

Setting	Success	Actors	Data	Change Agenda, Collaboration Aim	Reported In
New product development	Less	Strategy team AutoCo, data analytics service providers	102 meeting observations, 112 interviews, 2,693 documents	Utilizing external analytics knowledge to develop novel services	Deken et al. (2016, 2018)
	More	R&D team with external designers	28 meeting observations, five interviews, meeting minutes, websites	Developing new application areas for existing products that require [external] software development services	Lauche and Erez (2015)
New forms of network governance	Less	Medical specialists in four hospitals, hospital boards, insurance companies	Two meeting observations, five interviews, 121 documents, 47 presentations, 66 email threads	Pooling expertise and operations for rare forms of cancer treatment across several hospitals	Patru (2017, chapter 3)
	More	Architectural firm, contractors, professional association	16 meeting observations, 25 interviews, 100+ documents on new governance model, 25 policy documents	Establish new governance structure that supports direct collaboration with contractors led by architects	Liefink, Smits, and Lauche (2018)
Recognition of social issues, network-wide change of business practices	Less	Human factors specialists, drilling engineers, training company	Two conference observations, five days' training observation, 23 interviews reports	Recognition of human factors in training and business practices to reduce near misses and accidents	Verweijen and Lauche (2018)
	More	Managers concerned with sustainability	Six project meetings, 90 interviews with R&D managers, purchasing, sustainability officers, external partners	Using external collaboration to mainstream sustainability into business practices and to establish network-wide solutions	Blazevic and Lauche (2018)

**Table 5.2.** Issue-selling Strategies Identified in Cases.

Issue-selling Strategies	Directed at	Link to Literature
Presenting issue using the logic of business plan, doing one's homework		Dutton et al. (2001)
Bundling issues, linking them to established goals	Gaining internal legitimacy within own company	
Normalizing issue by linking it to established procedures and expert knowledge		Howard-Grenville (2007)
Taking advantage of serendipitous encounters for path creation	Pursuing project goal, connecting with potential external partners to define (internal) strategy	De Rond and Bouchikhi (2004) Garud and Karnøe (2001)
Utilizing external network to clarify collaboration goals		Seidl and Werle (2018) Deken et al. (2018)
Mobilizing others, appealing to commitment	Creating common narrative, persuading professional peers, building community	Wickert and de Bakker (2018)
Utilizing external network to create momentum		Ferrero et al. (2015) Blazevic and Lauche (2018)

also internal benefits. Their own understanding of the emerging field of data analytics was limited and they quickly realized that they would need to collaborate with an external party. As the innovation deviated from the core capabilities of the company and required new business models, the strategy team saw itself confronted with the illegitimacy that radical innovation can encounter, particularly in established firms (Dougherty & Heller, 1994; van Dijk et al., 2011). They engaged in an internal strategizing process in which they tried to gain legitimacy and resources for their endeavor in parallel with exploring the potential for such services with several external partners. Externally, their strategies were *taking advantage of serendipitous encounters* and *utilizing the external network to clarify collaboration goals*. Internally, their strategy was *doing one's homework* – they prepared detailed scenarios and carefully considered potential implications – and *normalizing innovation* by fitting it to existing procedures. However, they had to bend some organizational routines to circumvent internal stage-gate procedures for purchasing external services. Yet the process was much more longwinded than initially anticipated, the legitimacy issues were not resolved for a long time, and the external parties got increasingly frustrated as a result.

#### *Case 2: Selling Radically New Approaches for New Product Development*

In the second study, several new product development teams pursued innovative ideas that transcended “business as usual” in their respective organizations and therefore had to fight for recognition and resources. They attempted to rethink their offering and product-market-combination by using more digital technology or accessing new markets by offering integrated services or addressing a new different clientele through new business model of pay for use rather than ownership. In all cases, the innovators themselves were fascinated and utterly convinced

about the strategic relevance and potential of their ideas – and somewhat surprised that their insights and passions were not universally shared. Their strategies were focused on *gaining internal legitimacy* with varying degrees of success. Externally, they also took advantage of *serendipitous encounters* and *utilized the external network to create momentum*, which in turn shaped internal strategizing.

The most successful team was acutely aware that they would need to sell the strategic relevance of their project in order to obtain the required resources. They used similar strategies to those identified by Dutton et al. (2001): they made *continuous proposals*, *presented the issue using the logic of a business plan*, and involved senior levels. They persevered when their immediate team leader felt incapable of making such a big decision and continued their selling effort along all levels of the company hierarchy until the CEO finally realized the value of their proposal. They eventually partnered with an established large company to develop the middleware that enabled offering their products as part of a product-service-system in a new market.

In the less successful teams, the frustration about lack of resources and understanding culminated in what Lauche and Erez (2015) refer to as collective moaning. The teams tried to voice their concerns and confront their leaders, but mainly by highlighting the potential for failure and less so by selling the strategic relevance of the issue or linking it to established goals. Yet, their attacks were hidden in critique between the lines and often resulted in a shared frustration rather than proposals for action. Their external collaborations were more pragmatic and low-key rather than strategic alliances: they hired individuals, in particular industrial designers, to help them articulate their vision but *did not utilize their external network to create momentum*.

### *Case 3: Initiating a Network for Regional Healthcare*

In the third and fourth cases, a group of professionals pursued new forms of network governance aimed at delivering higher quality services. In Case 3, national-level policies proposed pooling resources and expertise on specific cancer care. Medical specialists saw it as a worthwhile initiative to concentrate on specific diseases for the quality of medical care and specialization also suited their own goals of professional development. It tied in with existing practices of joint surgeries where consultants from an academic hospital assisted their colleagues in three regional hospitals to increase the success rate of tumor removals. While the practice was medically successful, the financial compensation had not been properly addressed and hospitals at both sides incurred losses.

The collaboration started in a group of medical specialists from the four hospitals. Their aim was to establish a governance model for the allocation and reimbursement of surgeries between the hospitals. Although the group interacted mostly remotely, it worked smoothly for sorting out practical issues, as the medical specialists were able to draw on their shared professional background. Their remote approach was less successful for issue selling toward their recipients, the respective hospital boards and the insurance companies. The strategies they used were *“doing your homework”* by building on relevant national-level reports and

guidelines and “*using the logic a business plan*,” framing the network as an investment. The insurance companies were initially enthusiastic and said they would be “willing to contribute an amount” but requested more concrete information. Then new difficulties arose: the insurance company merged with another insurer, making it difficult to determine the appropriate issue recipient, and the academic hospital announced unexpectedly that they could no longer afford to conduct the joint surgeries. The network members used *established procedures* to ask the boards for a transitional budget and to take up their financing needs with the insurance companies; yet, they were not able to directly influence the proceedings. The insurance company did not fully understand the implications of the proposal, and the boards did not raise the issue in their negotiations. The strategizing efforts failed and the governance agreement was not established. Had the initiators been more aware of their relational context, they may have realized earlier that their fact-focused, remote approach that had worked well among them as professionals, was not sufficient to convince their two rather different groups of recipients.

#### *Case 4: New Governance Models for Architectural Services*

In Case 4, an architectural firm developed a new governance model for project delivery aimed at improving project quality as well as cost control. Through direct collaboration between the architects and subcontractors, they reduced coordination efforts and created more transparency and involvement among project partners, which enabled them to control how the design was implemented and to reduce overhead and misunderstandings. The approach was new to the construction field and thus required issue-selling efforts toward multiple recipients to gain legitimacy for the new approach.

Actors in the architectural firm were very aware of the difference and dependence they had to bridge and engaged consciously with their recipients. They *took advantage of serendipitous encounters* when they first came upon a client who was open to their approach and convinced them that more architectural quality could be achieved for predictable and controllable budgets through their new governance approach – a variation of the strategy of *using the logic of a business plan*: more value for money. They *utilized their network* of subcontractors and *mobilized* them for the new governance model by reducing coordination costs and involving them in the design process, thereby building a network of stakeholders that helped to *create momentum* for the new governance model.

Their efforts were less successful in selling their model to their fellow architects. European tender regulations required comparable competitors for each public tender process, and the architecture firm realized that being successful as a niche solution was not sufficient: they needed to convince other architectural firms to also adopt their governance model in order to compete for tenders. They started to expand their efforts at *mobilizing others* and *utilizing their external network* by collaborating with educational institutions and the professional association for architects. Yet, there was no direct interaction regarding a shared, to be developed inter-organizational object (Deken & Lauche, 2014) and their sales pitch of more client benefit did not dissuade the doubts of their professional peers that they

were trespassing beyond the professional boundaries of architecture. While the new governance model worked well as a project delivery method, their professional peers feared that they had veered too far into the territory of the general contractor and were no longer really architects.

*Case 5: Bringing Human Factors Knowledge to the  
Drilling Engineering Community*

The remaining two examples concern attempts to sell social issue selling and build community. In Case 5, we analyzed how a group of marginal actors attempted to convince other, more powerful actors to adopt their insights. A major disaster, the blow-out of the Macondo well and the subsequent oil spill in the Gulf of Mexico in 2010, came as a shock to the oil and gas industry. Human factors specialists saw it as an opportunity to promote their insights on the underlying psychological and organizational factors of such accidents (e.g., Dekker, 2011; Reason, 1997). Previously, the momentum of a disaster had helped to create visibility and legitimacy. The aviation industry started to include human factors in mandatory pilot training after the collision of two airplanes in Tenerife in 1977, and the explosion of the Piper Alpha platform in the North Sea in 1988 formed the basis of institutionalizing human factors in the oil and gas industry. The human factors community hoped to *utilize the momentum* of the Macondo disaster to initiate change among the more powerful engineering community.

They used mainly two strategies: *mobilizing other professionals to build community*, and *linking the issue to established procedures and formats*. As in the medical case, it proved relatively easy to establish collaboration among professionals. People were willing to invest time and effort into what one of the organizers described as “we are trying to change an industry.” They utilized the established formats of the Society of Petroleum Engineering to organize a summit in Houston in 2012 and a workshop in London in 2014 to bridge different disciplinary backgrounds to discuss how human factors issues could be mainstreamed.

This approach was partially successful: it reached many individuals on their personal learning trajectory about human factors, and the reports and industry white papers created visibility and legitimacy. Yet, this recognition came slowly – it took 6 years for the most extensive report on human factors to appear and eight years for the guidelines on crew resource management for drilling to be accepted. When the oil price went down, many initiatives were regarded as nonessential and shelved. None of the training recommendations became mandatory and the human factors consultants found it difficult to monetize their knowledge.

Notably, strategies that were not used included *using the logic of a business plan*, *linking issue to established goals* other than safety, and *connecting to external partners to define strategy*. A possible conclusion is that the human factors professionals were so “convinced of their superior knowledge about human error and incident causation” (Verweijen & Lauche, 2018) and, therefore, failed to recognize the relational context of their issue selling attempts and the contested nature of this learning process. Participants proposed to present the issues in the logic of a business plan to convince senior managers of the financial advantage of preventive measures,

yet this suggestion was not picked up. The hope that the Macondo disaster would constitute the “Tenerife moment” for the oil industry has so far failed to materialize.

*Case 6: Using External Collaboration to Mainstream Sustainability Issues*

The final case followed middle managers in different companies in their attempts to mainstream sustainability practices as insider activists. Similar to the human factors specialists they were driven by genuine concerns to change organizational practices to reduce negative impact, framing their efforts as “I want to leave the world a better place” or “We owe it to our children.” Actors in this case were acutely aware of the need to sell their issues from a less powerful position and used a broad range of the strategies. They sold sustainability issues within their organization through *doing their homework* on impact measurement, *using the logic of a business plan* and by *linking it to established goals* such as energy savings or business continuity: climate change and extreme weather could affect their supplies and prices. Whenever possible, they also *drew on established procedures*, such as the approval process for new equipment or production processes that required a sustainability assessment. They also drew on their external network, both for defining strategy and for creating a common narrative. *Taking advantage of serendipitous encounters* enabled them to find like-minded people and build coalitions. They also *utilized their external networks for clarifying collaboration goals* across the supply chain or business ecosystem: confronted with requests about their on environmental footprint, actors in different chemical companies realized that they needed to create a shared database, as their individual Life Cycle Analyses were not comparable. This external request helped the insider activists to obtain the resources for collaborating on such database. Actors also *mobilized others* through personal stories to invoke emotional commitment and convey the sense of urgency, for example, by showing photographs of appalling working conditions at one of their suppliers at a board meeting. Board members were shocked about this reality and agreed to a new program to help suppliers improve their social and environmental impact.

The successful trajectories in this study used a strategy that the human factors community failed to accomplish: they created a sense of a common narrative that enabled them to utilize efforts elsewhere to promote the issue in their own organization. Sustainability as a global concern for humanity and the presence of a social movement lent itself to creating such a common narrative. Actors *used their external contacts to create momentum* through participation in roundtables and working groups of their industry associations “move a market.” In the unsuccessful trajectories, it was precisely this connection to an external network that was missing: actors were not able to connect to a broader common narrative and focused on an instrumental, short-term approach.

## DISCUSSION

Individual actors can play an important role in initiating and shaping inter-organizational collaboration (Olk & Earley, 1996, 2000). The aim of this chapter was to illustrate how their collaboration attempts are embedded into efforts to sell the



strategic relevance of their concerns and mobilize other actors for their agenda for change. Following the perspective of these actors shows the emerging nature of collaboration and their intentional efforts of to bring about change from a peripheral, often less powerful perspective. While not all inter-organizational collaboration is initiated through such bottom-up strategizing, it is likely that any formation process will also be affected by the issues that actors pursue in relation to the collaboration and the strategies they employ to further their perspective.

The six cases were selected to compare and contrast more and less successful efforts in different settings: new product development, new forms of network governance, and network-wide changes of business practices. While there is no straightforward success criterion in a situation that is characterized by multiple interests, I have taken the perspective of the initiating actors to determine whether they were able to further their goals during the timeframe of our research. It may simply be a protracted situation that developed further after our involvement and successes may have occurred later, and other actors many have regarded the outcomes differently.

The analysis highlighted (1) the relevance of the relational context of issue selling, (2) the role of intentionality in dealing with emerging possibilities, and (3) the utilization of external networks for internal change efforts. Regarding the first point, the cases differed in the nature of the issue recipients and how actors chose to address them. It appears to be easier if there is a single and unambiguous issue recipient. The product development cases were mainly focused on gaining internal legitimacy and the issue recipients were relatively clear: in order to access the external expertise required to further their initiatives, the teams needed internal acknowledgement of the strategic relevance of their projects. In the AutoCo case, actors used ample interaction with external partners to define the scope, but made limited issue selling attempts toward their CEO and corporate board. In the case of the R&D teams, the successful teams were firmly focused on the internal issue selling process. Their dependence (Carlile, 2004) on the external partners was lower, which may have helped the teams to focus on the difference in strategic understanding between themselves and their senior management.

In the other cases, the actors all faced multiple stakeholders and thus several different issue recipients. Such complex situations require different issue-selling strategies for different constituencies. The medical specialists mainly focused on the collegiate collaboration between themselves, bridging organizational but not professional boundaries with ease. Their attempts to influence the hospital boards and the insurance companies to finance the network activities were less successful. Similarly, the human factor advocates in the oil industry setting were strongly focused on their own collaboration across organizational boundaries and less successful in reaching out to the drilling engineering community. One could conclude that it appears to be easier to sell an issue to like-minded others who share a similar understanding about the purpose of the collaboration, as was the case in the medical and human factors profession. Yet, this does not hold for the architectural firm that found it easier to establish collaboration with the subcontractors with whom they worked toward a shared object (Deken & Lauche, 2014) than to sell their model to their fellow architects with whom there was no shared object.

Actors in the architectural firm and those pursuing sustainability driven collaboration also faced multiple recipients. Both engaged consciously with their recipients, very aware of the difference established practices and their proposed solutions and the dependence on other actors (Carlile, 2004). The architectural firm convinced clients by guaranteeing architectural quality for predictable budgets, and subcontractors by empowering them to co-create better solutions for the client. In other words, they translated the strategic advantage of their governance model in a customized manner to the respective recipient. The successful sustainability activists utilized serendipitous encounters and external contacts to pursue their change efforts internally and externally. They were acutely aware of their less powerful position and tuned their message to their respective recipients.

The findings of these cases confirm Garud and Karnøe's (2003) notion that being solely focusing on one's own goal and overlooking the need to mobilize others can hinder path creation. Some of the innovation teams, the medical professionals and the human factors experts were so convinced about their necessary job for the greater good of society that it left them blind for the need for political maneuvering: they were "so enthused by the act of insight that they begin pursuing it with a single-minded purpose ... and thereby miss out on an opportunity to mobilize others" (Garud & Karnøe, 2001, p. 10). It also seems that those who drew on all three types of strategies – issue selling for legitimacy, connecting with partners to define strategy, and creating a common narrative – as in the case of promoting sustainable business practices were most successful in creating impact.

Being aware of the relational context in which one pursues collaboration might be crucial for selling the strategic relevance, in particular if the relational context involves marked power differences and those most knowledgeable about the issue depend on other actors for the realization of their collaborative initiatives. Other studies on organizational and institutional change have indicated that a marginal community may be able to alter established relations when their proposal for change draws on traditional values (Lawrence, Malhotra, & Morris, 2012), familiar discursive resources from other institutional contexts (Levina & Orlikowski, 2009), or the established community's interpretative schemes (Howard-Grenville, 2007). These studies suggest that a change initiative by a marginal community needs to radically break with existing authority relations, while still resonating with established and recognizable cultural resources. Yet, the human factor advocates did not connect to the dominant drilling and management discourses and instead largely operated largely from their own frame of reference.

As Sonenshein (2012) has pointed out, conceptualizing these efforts as issue selling allows us to connect how people pursue change across individual, organizational, and societal levels. By its very nature, issue selling is a relational concept in Emirbayer's (1997) sense, and it appears that those who are aware of their relational context and understand who they need to bring on board and how these others might be persuaded to join the campaign were more successful than those simply driven by a single-minded purpose.

Regarding the second point, following the perspective of these actors showed the emerging nature of collaboration, and the intentional efforts of these peripheral actors in bringing about change. In both New Product Development cases,

actors actively recognized and utilized opportunities that presented themselves. The AutoCo team, the architectural firm, and the sustainability initiatives were driven by actors with a firm conviction that strategic change was required. They drew on serendipitous encounters within their external network to explore possible avenues for collaboration. The medical and the human factors specialists both built on an external event that created legitimacy – a government policy for centralization of cancer care and the Macondo disaster – but seemed less apt in drawing on encounters and establishing links across professional communities.

Regarding the third point, the utilization of external networks for internal change efforts, a clear pattern emerged from comparing the more and less successful cases. As issue sellers were hitting the wall internally for their concerns, they connected to like-minded external stakeholders in their thus initiating change as a profession rather than organization (Howard-Grenville, Nelson, Earle, Haack & Young, 2017). In particular the architectural firm and the sustainability managers used the external collaboration success to gain credibility and create momentum for change. Insider activists realized that many challenges could only be tackled through stakeholder collaboration. These grand challenges were conveyed by a “common narrative” that all participants could connect to and identify with as to their individual, long-term visions of making this world a better place. The common narrative also served as a connecting platform for the external network participants to craft robust, yet flexible collaborative activities.

Analyzing these cases from a processual perspective, I hope to have shown that what appears as emergent trajectories on the level of the inter-organizational collaboration is in fact driven by deliberate efforts of path creation on behalf of the actors involved. These efforts are typically not preconceived as part of an alliance strategy but rather take advantage of opportunities that offer themselves *en route*. These wayfinding efforts appear to be more successful if actors take their specific role in the relational web of potential partners into account and engage different issue recipients in a customized manner accounting for the respective differences and dependences.

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