

Mediating Control:  
Strategy implementation practice  
in an international hotel organisation

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## **Abstract**

The question at the heart of this research is: How do middle managers implement strategy through their day-to-day practice and what role does culture play in their agency. The study draws on multiple bodies of literature to adopt a transdisciplinary approach, including strategy implementation and control, strategy as practice (SaP), organisational culture and social theory. The social theories relevant here concern the relationship between agency and structure, in particular, Structuration Theory (ST), and specifically Stones' Strong Structuration Theory (SST), which allows the agentic behaviour of middle managers to be at the heart of this study.

The literature review reveals numerous previous studies of strategy implementation that have focussed on broad institutions and structures associated with organisational life, downplaying the role of agency. This study adopts a practice approach with a focus on the micro practices of middle managers to address this imbalance and the call for more analysis of agency in its sociocultural context. Organisational culture is complex, contested and contextually grounded, thus it is embodied in structures and agency. For this reason, the project adopts a constructionist philosophy to explore the micro agency of middle managers in a complex service organisational setting typified by an international hotel company case study. Such organisations are geographically dispersed, with a unique business model that provides a particular strategic context for this study. Qualitative methods utilizing semi-structured interviews and diaries provide a rich data set, that reveal how managers exert agency within the strategic sociocultural context, how they implement strategy through their daily decisions and actions and what role culture plays in their agency.

The study found that managers draw upon internalised stocks of knowledge, their individual understanding of the strategic terrain and external structures to comply with or resist strategic hegemony. The study contributes to knowledge, in five key ways. Firstly, it contributes through the development of a nascent culturally imbued theory of structuration and secondly, methodologically, this study offers experiential reflection on the use of Stones' SST and Composite Research Strategy (CRS) for organisational research and SaP research in particular. Thirdly, it reveals how MMs implement strategy through their day-to-day actions and what role culture plays in their agency. Fourthly, GMs interview and diary logs, reveal acts of protection and buffering unique to the agents' position practice relations. The final area of contribution relates to the change in the GM role that has resulted from structural changes in the industry, which has practical implications for the professional role of the Hotel General Manager.

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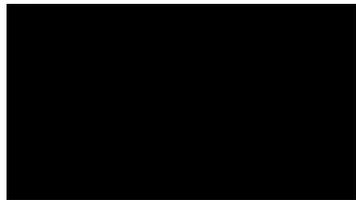
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I dedicate this thesis to my brilliant children, Tom and Aimée, I am so proud of you, may you achieve all your goals in life.

## **Author's Declaration**

I declare that the research contained in this thesis, unless otherwise formally indicated within the text, is the original work of the author. The thesis has not been previously submitted to this, or any other university, for a degree and does not incorporate any material already submitted for a degree.

Signed:



H.C. Atkinson

Dated 29<sup>th</sup> July 2020

## Chapter One - Introduction

### 1.1 Background to the study

The question at the heart of this research is: *How do middle managers implement strategy through their day-to-day practice and what role does culture play in their agency.* This research is stimulated by an interest in strategy implementation and the role of middle managers, and the lack of research focussing on the practice of individual agents. It is operationalised within the empirical context of an international hotel company placing Hotel General Managers (GMs) at the focal point of this research. Strategy implementation is an important topic for investigation not least because of its complexity and the arguably high levels of failure (Koseoglu et al 2017; Okumus 2001). Candido and Santos discuss the wide-ranging and often controversial views on strategic implementation failure. They present several studies which report between 50-90% failure rates in strategy implementation (Candido and Santos 2015) but combined with broad and variable definitions (Hughes 2011), it is acknowledged that the true rate of failure is still undetermined. This lack of precision in definition, or agreement on the size of the problem, should not detract from accepting there is a challenge.

Although there is widespread recognition that organisations experience difficulties implementing strategies, and despite the large body of literature on strategy in general, there is paradoxically a lack of research on strategy implementation practice noted in the extant literature (Aaltinen and Ikavalko 2002; Dobni & Luffman 2003; Manteer and Vaara 2008; Noble 1999a; Okumus 2001; Raps 2005; Okumus and Roper 1998). Furthermore, strategy scholars acknowledge that in response to new economic circumstances, a new era of competition has led to rapid change and innovation (Golsorkhi et al 2011; Johnson, Melin and Whittington 2003). They argue that strategic planning and implementation, in large organisations, must therefore be a continuous process involving more people, across all levels in the organisation (Johnson, Melin and Whittington 2003). The key concern of this researcher is the role of middle managers in the implementation process, because middle managers constitute a critical nexus in organisations (Atkinson 2006), they are identified as key strategic actors by Barlett and Goshall (1996) and are important micro-strategisers (Johnson et al 2003).

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This study draws on multiple bodies of literature to adopt a transdisciplinary approach (Whittington 2011a), grounded in different strands of theory including organisational theories relating to middle managers, strategy as practice, strategy implementation and control, organisational culture and social theory. Transdisciplinary research (which emerged from education studies) provides a holistic perspective, that accepts and focusses on “the inherent complexity of reality” (Bernstein 2015:np). The social theories utilised include theories of agency and structure, in particular structuration theory, which puts the agentic behaviour of middle managers at the heart of this study. Mindful of their compatibility, the thesis will draw on a plurality of literatures and theories which together underpin this unique micro study of middle manager agency in a complex service organisational setting.

Middle managers constitute a lynchpin between strategy and operations (Balogun & Johnson 2004), between corporate head office and operational employees. Importantly, they exert, and are subject to, control (Rouleau and Balogun 2011; Storey 1985a); they act as boundary spanners (Brownell 1990) and have a mediating role important in the definition and execution of strategy (Judge and Stahl 1995; Wooldridge et al 2008). A gap remains to explore how and why middle managers engage in strategic activities (Pappas and Wooldridge 2007), this study addresses *how* middle managers implement strategy. In the hospitality industry, and hotels in particular, general managers (GMs) have a particular and special role in the organisation (Jayawardena 2000; Nebel and Ghei 1993; Roper 2018). Arguably ‘critical and unique, hotel general managers are key implementers of business strategy (Eder & Umbreit 1989; Roper and Hodari 2015; Hodari and Sturman 2014). Hotel GMs are responsible for complex business units (with a range of business types under one roof) (Harris and Mongiello 2001). Their span of control and autonomy is due to the geographical remoteness of operational units which are acknowledged as complex (Korczynski 2002) and the multiple business operations within a single unit (Brander Brown and Harris 1999; Harrington & Kendall 2006) and the 24/7 nature of the operation (Burgess 2012). Thus, the GM role has particular combination of demands and characteristics that makes them stand out from middle managers in other industries. In the multi-unit, geographically dispersed organisational setting, such as an international hotel chain, these middle managers are critical to the delivery of a company’s strategic intent (Aaltonen and Ikavalko 2002; Floyd and Woolridge 1994; Rouleau and Balogun 2011).

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The seminal work of Johnson, Melin and Whittington (2003) galvanised a move to understand strategy as practice (SaP). The distinctive approach of SaP is typified by the application of social theory to understand the practice of multiple agents in organisations. By emphasising the situated practices and micro level agency, which bring individual human agency to the fore, the ontology of strategy is shifted from something an organisation possesses to the activity of organisational members (Jarzabkowski, Balogun and Seidle 2007; Golsorkhi et al 2011; Jarzabkowski 2004; Whittington 1996; Whittington 2003). Although there is now a significant body of published literature in this area, there are still calls for more research that addresses practice in the web of social relations and that engages social theories more deeply in the analysis of empirical data. This line of enquiry can facilitate a better “understanding of the activities, processes and practices that characterize organisational strategy and strategizing” (Golsorkhi et al 2011:13). It is widely acknowledged that Management Control Systems (MCS) are key to strategic implementation (Bhimani and Langfield-Smith 2007; Chapman 2005; Malina and Selto 2001; Malmi and Brown 2008; Schmelzer and Olsen 1994; Simons 1990; Simons 1995; Whittington 2011b). With the advent of sophisticated multi-dimensional performance management systems and control tools, middle managers are held accountable against a range of strategic targets and key performance indicators (KPIs), to navigate the tension between competing demands of customer service, employee satisfaction and financial targets (Morey and Dittman 1995; Nebel & Ghei 1993; Phillips 2007). For Hotel GMs this is often set within complex governance structures involving property owners, asset managers, branded hotel operating companies, with franchise or management contracts in play (Roper 1995; Roper & Hodari 2015; Slattery 2012).

The researcher observes that strategy implementation is enacted in a socio-cultural organisational setting, and as such culture, and organisational culture in particular, provide central constructs for this study. Culture has been acknowledged as a key factor in the operation of strategic implementation and control (Alamsjah 2011; Hrebiniak 2006; Otley 2003; Raelin 2011; Ryan 2005; Scheytt et al 2003; Wilkins & Ouchi 1983). In addition, it is acknowledged that full service hotel settings have strong organisational and industry cultures (Brander-Brown 1998; Brownell 1990; Chen et al 2012; Goss-Turner 2010), this is why culture is an important element of this study. Culture and Organisational culture are central to exploring the research question, drawing on anthropology (Geertz 1973; Wright 1994), organisational studies (Alvesson 2002, Martin 2002 Schein 2004;

Whittington 1992) sociologists (Giddens 1984; Parker 2006; Stones 2005) facilitate an ‘unbounded’ transdisciplinary investigation (Bernstein 2015).

In summary, this study addresses an important topic, bringing together multiple bodies of literature to focus on the problem at hand, with acknowledged opportunities to extend our understanding. Offering a socially constructed view of GM agency tackles the limitations in the existing research and theorising and addresses the gaps in the understanding of strategy implementation.

### **1.2 The research question, aim and objectives**

The importance of middle managers is widely acknowledged, as is the need for more research into the micro-practices of strategy implementation, thus the question at the heart of this research is:

How do middle managers implement strategy through their day-to-day practice and what role does culture play in their agency?

This study utilises social theory to explore these research questions, in particular Giddens’ Structuration Theory, which infuses the research with particular language and a predisposition to adopt a social constructionist philosophy. Emphasising the way that culture has an influence on how people experience the world around them (Crotty 1998), Stones’ Strong Structuration Theory (Jack & Kholeif 2007; Stones 2005) will be utilised, in an attempt to bridge the polarised debates that persist in many academic fields over the primacy of structure versus agency (Archer 1989; Hopper and Powell 1985; Ritzer 2007; Storey 1985; Whittington 2011b). By asserting an analytical separation of internal structures and external structures Stones attempts to overcome the issue of dualism through a quadripartite framework (Parker 2006; Stones 2005). Stones utilises the concept of position practice relations<sup>1</sup> (Cohen 1989), thereby also bridging the ontological rifts in the micro macro divide. Stones also provides a practical methodological guide, because SST moves forward and facilitates the use of Giddens ST in an empirical setting (Coad, Jack & Kholeif 2016; Elbasha and Wright 2017). Strong Structuration Theory (SST) will be

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<sup>1</sup> Position practice relations (or ‘slots’ to use Bhaaskar’s terminology) are contextually grounded roles which contain pre-existing rights and expectations for the people who inhabit those roles. PPR will be explained in full in Chapter 3.

theoretically extended to overtly recognise the role of culture in the processes of structuration and then employed in the design of this research project and the analysis of the data, something that is still rare in published studies in management (Elbasha and Wright 2017; Jack and Kholeif 2007).

Consequently, the aim of this study is to explore the practice of strategy implementation, and the role and experiences of middle managers in the continual production and reproduction of structures and systems in complex multi-unit service organisations. To achieve this aim, the following objectives are proposed: -

1. To critically examine the role of middle managers in the practice of strategic implementation in a service industry context.
2. To explore the role of culture, and organisational culture in particular, and evaluate the relationship between culture, structure and agency.
3. To understand the in-situ active agency of middle managers and the role of position-practice relations in the praxis of strategy implementation.
4. To explore whether, and to what extent, Stones' Strong Structuration Theory can have theoretical and empirical utility in the study of organisational and strategic practices.

Research is a human activity permeated with biases and subjectivities that pertain to the researcher themselves, therefore, it is helpful to understand the journey of the researcher and her philosophical position, as this will directly impact upon the constructs employed and the methods adopted.

### **1.3 Positionality of the researcher**

This project is influenced by the researcher's background in hospitality having been brought up in a family hotel business followed by a professional education and background in management accounting (CIMA member since 1994) and her practical experience in strategy. These experiences were brought together teaching management accounting and strategy to hospitality management students over many years. The development of thinking in the three key discipline areas emanating from accounting, strategy and social theory, have informed this study. Three readings were seminal for the author and stimulated the creation of this study as well as influencing its theoretical foundations.

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These are Humphrey and Scapens (1996), Whittington (1992) and Stones (2005), they were key way finders for the author in her intellectual journey. The evolution implicit in these readings and the sources they led to, also mirror the researcher's own development from professional training, grounded in normative theory and deductive logic, to a constructionist research exploration, seemingly floating in a liminal theoretical space, using inductive and abductive reasoning.

The researcher was philosophically drawn to Interpretive Accounting Research (IAR) after reading work, such as, Humphrey and Scapens' 1996 defence of case study research in accounting. They accepted that "empirical data and philosophical argument cannot provide objective answers" (1996:93), acknowledging that "social activity is the result of an interplay between social structures and human agency" (1996:94). This was a welcome alternative to the functionalist, positivistic research predominantly published in accounting journals. One influential study emanating from the IAR field is Ahrens's longitudinal study of a management control in a restaurant chain was particularly influential for the researcher. His findings were published in separate articles (Ahrens and Chapman 2002; 2004; 2007), initially drawing on Giddens's structuration theory, emphasizing the active role of accounting and control systems in the co-construction of practice through interaction of agents and systems (Ahrens and Chapman 2002). His later work emphasized culture and control and advocated the role of practice theory in IAR, a field of research which utilized Giddens work extensively (Englund, Gerdin & Burns 2011).

The connection to Giddens' Structuration Theory (ST), led to Whittington's 1992 seminal article "Putting Giddens' into Action: Social systems and managerial agency". Whittington, (a leading strategy scholar, whose text book had itself underpinned the researcher's practice as a lecturer) reviewed the management literature to reveal the influence of Anthony Giddens, and the adoption and contribution of his structurationist views of managerial agency on research studies in management. Whittington revealed substantive influence of Giddens' work, but also a 'particular' selective use of his constructs and concepts. The work of Whittington provided an entrée to strategy as practice literature (SAP), discussed in the literature review, which views strategy as something that people *do* rather than something organisations *have* (Golsorkhi, et al 2011). This represents an ontological shift that has epistemological and methodological implications, making micro

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studies a necessity and drawing upon a critical realist approach (Herepath 2014) as well as social constructionism more broadly (Golsorkhi et al 2011; Whittington 1996). SaP provided authentication for the focus on and an interest in middle managers as agents in the nexus of organisations (Atkinson 2006) thus underpinning the legitimacy of a study focused at the micro level and affirmation of the appropriateness of a natural constructivist stance.

The final cathartic reading was Stones' 2005 Structuration Theory, this work helped the researcher make the leap from the abstract to the empirical. Stones' Strong Structuration Theory (SST) gave Giddens' ST utility for researchers, providing ontological grounding and practical unraveling of, what was otherwise, a somewhat obscure and hard-to-use theory (Coad, Jack & Kholeif 2016; Elbasha and Wright 2017; Englund, Gerdin & Burns 2011; Greenhalgh & Stones 2010; Jack & Kholeif 2007). The researcher found Stones' work through reading of work of, and conversations with, Professor Lisa Jack, who pioneered the use of SST in accounting research in the UK and who chaired the Management Control Association for a period of time. By bringing a pragmatic focus on the act of empirical research and developing Giddens' abstract ontology, into an ontology in situ, Stones (2005) is able to provide a tool for researchers, which perfectly aligns the driving forces behind this research. In SST, organisational culture is recognized within external structures and position practices, in addition to being reflected in conjunctually-specific knowledge of external structures. Thus, SST appropriately facilitates the acknowledgement of wider cultural influences on the individual construction of meaning.

This personal narrative of exploration reveals the influential readings; although emanating from different discipline backgrounds, they inhabit the same broad ontological and epistemological landscape and provide the antecedents of, and theoretical underpinning for, this study. Thus unsurprisingly, this study is grounded in a social constructionist epistemological paradigm, which will be explained in full in the Research Methodology chapter. The empirical setting for this research is an international hotel company, which will now be elaborated.

## 1.4 Contextual Setting

This study is situated in the international hotel sector, part of the tourism industry, which is an important sector to the economy. Tourism is arguably one of the largest industrial sectors globally with 1.5 billion tourist arrivals in 2019 (UNWTO 2020)<sup>2</sup>. Global demand for hotels is at an all-time high, fuelling the continued development and change in the corporate hotel industry (Roper 2018). Responses to changing socioeconomic trends have together changed the way hotel companies do business and gain competitive advantage. For example, the advent of Online Travel Agents (OTAs) (Stangl, Inversini and Schegg 2015), the rise of the use of electronic word of mouth (EWOM) and the separation of the ownership and operation of hotel properties (colloquially termed, separating the bricks and the brains) (Gannon, Roper and Doherty 2010). This digital disruption and the changing strategic governance structures have precipitated the disintegration of the corporate hotel industry (Roper 2018). The way companies compete has thus changed, with the increased value and importance of brands, the need to reach along new and changing digital distribution channels and the rising customer expectations (driven by EWOM), there is a much greater an emphasis on consistent quality (Richard 2017). Thus, this is an important domain within which to research strategy implementation. In addition, it provides an interesting setting for research, from a sociocultural perspective, because the industry steeped in ritual behaviours and acknowledged resistance and deviance (Lugosi 2019; Mars and Nicod 1984; Peacock and Kubler 2001). Imbued with strong organizational cultures (Goss-Turner 2010; Harris and Ogbonna 2002) and with the critical role of people in the service delivery process unilaterally acknowledged (Lashley 2000; Korczynski 2002; Paraskevas 2001b; Sheehan 2012), these factors together make it an important, interesting and valid setting for research into middle managers' agency in strategy implementation.

The structural changes on the demand side and supply side, make this a uniquely complex and important domain for research. On the demand side, customer behaviour, expectations and access to hotels has been revolutionised by OTAs and price comparison websites. Customers can easily chase the best prices, and hotel dynamic pricing practices are now

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<sup>2</sup> Notwithstanding Covid19 crisis, Tourism will remain a very important sector of the global economy, although its recovery will take time and the industry will require 'Re-Setting' (Paraskevas 2020).

well known. Large scale customer loyalty programmes are used by global hotel companies, to draw customers back, keep them loyal and to tempt them away from OTAs, where commission rates range from 15% - 30% on bookings made. Direct bookings and speed of responsiveness to individual customer enquiries and demand trends, are now critical to competitive success in what is arguably a hypercompetitive market (Michopoulou and Buhalis 2008). Revenue management has become of preeminent importance and a new area of professional expertise, where branded hotels invest huge resources in centralised booking platforms and revenue management centers.

On the supply side the growth in branded hotel chains has been continuous and led to global multi-brand companies, seeking growth to dominate the markets, there have been significant mergers and acquisitions and a consolidation in the industry (Roper 2018; Slattery 2012). To facilitate growth, hotels adopt an Asset Light Strategy, this has meant value generation is separated between property (real estate), owners (institutional investors, private equity firms, high net worth individuals and specialised REITS<sup>3</sup>) and hotel operators (Gannon, Roper and Doherty 2010; McKenney 2016). These hotel operators can be large-scale branded chains or more anonymous hotel operating companies, who operate a hotel under another company name (for example Arora Hotel Group and PPHE Group). The picture is complicated as the three key elements, real estate ownership, brand identity (often linked to GDS<sup>4</sup>), and day to day running of the hotel operation, can be delivered by different legal entities. Roper (2018) discusses the separation of brand from management and the implications of this for growth and investment. There is a critical need to maintain high levels of “standardisation and replication to maintain brand reputation and uniqueness” (Roper 2018:105). In this contemporary business model, value for the brand operator’s, is grounded in running a tight ship and providing value for owners (Roper 2018; Xiao, O’Neill and Mattila 2012).

Hotel general managers have to navigate and mediate relations between these key stakeholders at a unit level. This unique role (Mulvaney et al 2007) is at the center of these macro forces and complex arrangements, they are key strategic actors and thus are worthy of study. It should also be noted that individual full-service hotels have a complexity all of

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<sup>3</sup> REITS stands for Real Estate Investment Trusts

<sup>4</sup> GDS - Global Distribution Systems, branded platforms for customer to book accommodation and other services.

their own, due to the multiple businesses and contract arrangements which comprise the operation itself (Harris 2006). Providing pure service in rooms division, production and service in Food and Beverage Departments, and complex often bespoke service through meetings conference and events (M&E). In addition, each of these businesses, within a business, have different temporal demands, need different skill sets, have different business dynamics and profitability rates. In addition, these businesses, or aspects of them, are often outsourced (Lamminmaki 2005; Paraskevas and Buhalis 2002; Roper 2018). The following quote vividly captures the ‘virtual hotel’.

You book a room on the website of a famous international hotel chain. As you arrive to check in, it’s reassuring brand name is above the door. Its logo is everywhere: on the staff uniforms, the stationery, the carpets. But the hotel is owned by someone else – often an individual or an investment fund – who has taken out a franchise on the brand. The owner may also be delegating the running of the hotel, either to the company that owns the brand or to another management firm altogether. The bricks-and-mortar may be leased from a property firm. In some cases, yet another company may be supplying most of the staff, and an outside caterer may run the restaurants. Welcome to the virtual hotel. (The Economist, 2009).

Arguably this provides a unique context for the practice of strategy implementation and a valid and interesting arena for research.

### **1.5 Overview of research methodology**

This research is grounded in a social constructionist paradigm. According to Crotty “social constructionism emphasizes the hold our culture has on us: it shapes the way in which we see things (even the way in which we feel things!) and gives us a quite definite view of the world.” (1998:58). Stones’ (2005) theory of structuration facilitates recognition of external structures and the effect of wider cultural influences on individual construction of meaning, which is consistent with a constructionist paradigm. In line with this philosophy, an inductive approach, with rich qualitative data collected through a case study method, will be employed to understand complex social phenomena, that exploratory fieldwork can reveal (Frow, Marginson and Ogden 2005; Stake1995).

A single case study organization is utilised as this provides boundaries and limits on the variability of the complex contextual factors that can play into the day to day lived

experiences of middle managers. Case studies are “bounded by time and place” (Creswell 2013:97), by choosing one organization, structural factors such as the social systems and regimes of accountability (embodied in the approach to strategic control) will be stabilised and broad influences such as organisational culture will be confined to some extent. Thus, facilitating the focus on the day-to-day reflexive practice of individual agents, in this case middle managers. In this research “knowledge and practice are studied as local knowledge and practice” (Geertz 1983 in Flick 2014:12), thus cannot be observed or understood out of context. The design of data collection instruments was grounded in the theoretical context of the literature with a clear focus on strategy implementation and culture plus an alignment to Stones’ quadripartite framework. Utilising SST in the design phase puts this study into a distinctive position with very few published studies having used Stones in this way.

Creswell asserts that a constructivist<sup>5</sup> frame will predispose researchers to “(U)se an inductive method of emergent ideas (through consensus) obtained through methods such as interviewing, observing, and analysis of texts” (2013:36). The data collection involved a combination of semi-structured interviews, self-reported diary/reflective logs and analysis of organizational documents. The data transformation (Simons 2009) followed good practice recommendations for interpretive research (Flick 2014; Graebner, Martin and Roundy 2012) with an immersive approach to the data coding, analysing and interpreting with transparency and rigour. This analysis used a combination of inductive and deductive processes, this blended approach utilized theory driven themes and constructs alongside data driven observations and findings (Braun and Clarke 2006) as such was both theory-led and inductive.

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<sup>5</sup> The term constructionism is adopted in this thesis rather than constructivism (see section 4.2 page 107 for full explication) it should be noted that these terms are often used interchangeably by researchers, in this case, Crotty uses the term constructivist.

## **1.6 Thesis Chapter Summaries**

The introductory chapter will now conclude with a summary of the remaining chapters in this thesis.

Chapter Two – Agents in context, Agent-in-focus.

This chapter will address the context for praxis and the agent-in-focus. First, critically evaluating the extant literature relating to strategy implementation and control, to understand the strategic context for action. Acknowledging the practice turn in strategy, it will progress to review the Strategy as Practice (SaP) literature to reveal a new ontological focus and the need for research into micro-strategising. Next, this chapter will explain the importance and role of middle managers. Reflecting on the field context of this research, service industry organisational settings, and reviewing the extant literature on Hotel General managers, to show what is known and reveal the space for contribution. Finally, this chapter will bring together the pluralist strands of research in this transdisciplinary project to clearly ground the research questions.

Chapter Three – Culture, Structure and Agency.

This chapter will explore culture, structure and agency, firstly providing a critical review of what is understood about culture and its structuring properties and the role of culture in organisational life. Continuing to carefully walk the line between the classical dichotomies of social theory the researcher will critically evaluate structuration theory and its adaptation and development into Strong Structuration Theory (SST). Finally, presenting and justifying the use of SST in tandem with culture to present a novel culturally augmented development of SST.

Chapter Four - Research Methodology

The research methods adopted are presented and justified and the underlying philosophical positioning of the researcher explained. To meet the demands of the research questions, in line with the researcher's disposition and the influential extant literature, this study will adopt a constructionist "onto-epistemology" (Tsoukas 2011:47). To progress this case

## Chapter 1

study research, the use of semi-structured interviews and self-reporting diaries will be described and justified. The research instruments, which are influenced by extant literature and embodying the SST quadripartite framework, will be described and the use of Stones composite research strategy for data analysis will be explained and made transparent to ensure the quality and plausibility of the research.

## Chapter Five – Findings and Analysis

The penultimate chapter commences with a detailed analysis of the case company which provides the important strategic context for action. The field-work will be presented, following a thematic organisation aligning the key research questions with detailed extracts from interviews, diary logs and company documentation, to support a narrative interpretation of the field. Themes established through data saturation will be drawn together to address the substantive findings and theoretical, methodological and practice contributions.

## Chapter Six – Conclusions and Contribution

The final chapter will present the grounding for the contributions, reflecting on the multiple bodies of literature and the transdisciplinary aspirations of this thesis, in the context of the original research question. The contributions to theory, methodology and practice will be elaborated from within the five key thematic areas which emerged from this research. This study will shed new light on how middle managers mediate the practice of strategic implementation within complex service organisational settings and the role of culture in this structuration process. In addition, a theoretical contribution emanating from the development of a Culturally Augmented Strong Structuration Theory and its methodological application, will support the observation of the changes to the Hotel GM role and its implications for practice.

## **Chapter 2 - Agents in Context, Agents-in-Focus**

### **2.1 Introduction**

The two literature review chapters in this thesis will provide a grounding for the study, critically reviewing the extant literature, knowledge and lacunae in relevant fields, evaluating substantive theories whilst also providing conceptualising theories to support the proposed theoretical framework (Flick 2014). As indicated in the introductory chapter, this study draws on multiple bodies of literature, some with very different philosophical backgrounds, including strategy implementation and control, strategy as practice, management theories, organisational culture and social theory. This study takes a practice perspective utilising structuration theory to reveal the active agency of middle managers who, it will be argued, are at the nexus of strategy implementation. At the heart of this thesis is the question, how do middle managers implement strategy through their day-to-day practice and what role does culture play in their agency? The theories and extant knowledge underpinning the first part of the research question will be addressed here and the second literature review chapter will explore Culture, Structure and Agency to address the theories informing the latter part.

The material is organised as follows; a selective review of strategy implementation and control literature will be followed by a critical evaluation of the Strategy as Practice (SaP) field, drawing on three key reviews and including relevant empirical studies, explicating the role of social theories in strategy research. An analysis of the management theories relating to middle managers will precede an evaluation of the hospitality applied literature, concluding with a presentation of published research relating to Hotel GMs, the agents-in-focus in this study. This chapter addresses the first objective of the study, i.e. to critically examine the role of middle managers in the practice of strategic implementation in a service industry context.

## 2.2 Strategy Implementation and Control – an overview of the field

The importance of research into strategy implementation has been established in the introduction. Although there are contested views linked to the definition and the size of the problem, there is broad acceptance the strategy implementation is difficult, and yet paradoxically under researched. Added to which, the effect of an era of rapid change requires a reconceptualization of strategy implementation. Compared to strategic planning, strategy implementation is a field of academic research that has often been characterised as being relatively undeveloped and lacking attention (Aaltonen and Ikavalko 2002; Atkinson 2006; Okumus 2003). Many key aspects of strategy implementation remain unexplained (Manteer and Vaara 2008) mainly due to an emphasis on strategic planning.

In addition to this paucity of research, the field of strategy implementation is characterised by pluralist and fragmented theorising and multiple discipline perspectives (Atkinson 2006; Okumus and Roper 1998; Whittington 1996). Strategy research is ‘crowded with competing theories’ (Whittington 1996:731) and worldviews, with authors approaching implementation from a broad range of discipline domains (Atkinson 2006; Chapman 2005; Pryor et al 2007). Noble (1999a) categorised strategy implementation research into two broad perspectives; structural view and interpersonal process. He found structural research focussed on organisational structure and control mechanisms, whilst interpersonal and process studies addressed issues of strategic consensus, autonomous strategic behaviours, diffusion of perspectives and leadership and implementation style and communication and interaction processes. Although not overtly acknowledged by the authors, these two perspectives embody the dichotomy between structure and agency.

Recognising the diversity of perspectives, Noble defines strategy implementation as a process of “communication, interpretation, adoption, and enactment” (Noble1999a:120). Along similar lines, Bhimani and Langfield-Smith (2007) reflect on the prescriptive and descriptive conceptualisations of strategy. They characterise two approaches; one prescriptive, rational, linear, formal, structured process; the other descriptive approach, where “strategy is regarded as organizationally grounded and decision-making processes and implementation are considered to be complex, dynamic and multifaceted” (2007:7). In this latter worldview ‘a balance is sought between thought and action, control and learning and stability and change’ (Bhimani and Langfield-Smith 2007:7) which is aligned

to the approach in this thesis. In addition, Whittington advocates a transdisciplinary approach and fundamental shift in the conceptualisation of strategy (Whittington 2006; Whittington 2011a).

There is a sustained body of work over decades identifying problems associated with strategy implementation including; Alexander 1985, Al Ghamdi 1998, Beer and Eisenstat 2000, Hrebiniak 2006, Raps 2006, and Reed and Buckley 1988. Despite the different conceptual and philosophical approaches, there are high degrees of consensus in the literature. Noble (1999a) found consensus over the complexity of implementation processes and its political and behavioural nature. He identified the need to involve organisational members early in the process to improve understanding and accept the potential need for adaptation of structures, leadership style and culture (Aaltonen and Ikavalko 2002; Noble 1999a). Hrebinaik (2006) identified some important features of strategy implementation, including the fact that planning and execution of strategies is highly interdependent, yet often practiced by different people, with senior managers delegating action to lower level managers. It will be shown that middle managers are a critical agent in this process. As well these departmental and hierarchical differences, strategy implementation involves many more people than the planning phase, which adds to the complexity and the challenges of coordination and communication. According to Beer and Eisenstat, successful strategy implementation requires “structure, systems, leadership behavior, human resource policies, culture, values, and management processes” (Beer and Eisenstat, 2000:29).

Raps’ (2005) prescriptions have a tactical quality, he proposed a checklist of 10 factors that are needed in an integrative approach to the ‘insurmountable obstacle’ that is strategy implementation. This advice included; “involve middle managers valuable knowledge” and focus on communication and top management commitment (Raps 2005:145). Alamsjah (2011) identifies 11 dimensions important in strategic execution, based on the views of 158 managers on a business school executive development programme. These were statistically correlated and ranked, resulting in corporate culture being identified as most influential, followed by, clarity and communication. According to Atkinson (2006), the difficulties associated with strategy implementation include clarity of communication, alignment of existing control systems and the role of middle managers. Atkinson (2006) focussed on the role of performance management specifically the Balanced Scorecard

(Kaplan and Norton 1996) and the contribution it could make to Strategy Implementation. In this review, she concurred there was an important need for alignment of existing control systems with the new strategic intent (Langfield-Smith 1997; Marginson 2002).

It is acknowledged that management control systems (MCS) are implicated in strategic implementation. Whittington proposes that “[S]trategy and accounting are inextricably intermingled” (2011:183) and Chapman argues that MCS are ‘ubiquitous’ and should be acknowledged for their strategic nature (Chapman 2005:6). Arhens and Chapman (2007) argue that MCS can be implicated in day to day routine of strategy. This study does not focus on MCS, but it is accepted that MCS constitute a significant aspect of the strategic context for MM agency, therefore it is useful to reflect briefly on the potential MCS which can be found in strategic domains for the agents-in-focus. Malmi and Brown (2008) developed a typology of five groups of controls, including Cultural Controls (comprised of Clans, Values and Symbols), Administrative Controls (governance and organisation structures, policies and procedures), Planning (long range and action), Cybernetic Controls (budgeting, financial and non-financial measurement systems) and systems of Reward and Compensation. The term package was used to recognise the elemental, yet interconnected, nature of MCS and the fact that “different systems are often introduced by different interest groups at different times” (2008:291). What is important to recognise is that these individual systems interact and sometimes counteract each other. Thomas and Ambrosini (2015) consider management controls as an antecedent of strategy implementation and implicate them in the “micro level mechanisms that foster or inhibit” managerial agency (2015:S110).

There is insufficient space in this thesis to consider all these bodies of work in detail, what is important for this transdisciplinary study is to acknowledge the importance and complex configurations of MCS in the strategic context of agency. It is the practices that emerge in relation to strategic control that form the focus of this study and thus Malmi and Brown’s typology is useful sensitising device for the describing the range of controls in situ. In the industrial context for this study, there has been significant structural change (Roper 2018) which has affected the Administrative Controls, also as a PLC the case company has a well-developed range of planning and cybernetic controls plus systems for reward and

compensation for the middle managers in this study<sup>1</sup>. However, it is the cultural controls that are of particular interest in this study.

Despite the diverse and partial research base highlighted earlier, (Noble 1999a; Pryor et al 2007) there is still widespread agreement with Mintzberg's 1978 thesis that "strategies are realised through consistency of decision making and action" (Neely et al 1994:142). Other studies also point to the importance of decision making, action and human agency. Tavikoli and Perks (2001) argue that strategy implementation is 'unprecedented' and requires the orchestration of organisational resources with human agency to deliver necessary change; these components include "strategic control, the role of human resources, organisational culture, middle-management commitment, etc" (Pryor et al 2007:3). It is precisely in such unexplored domains when human agency and decision making become important, which is why this study is focusing on the practice and active agency of middle managers. Turning for a moment to culture which is implicated by many authors (e.g. Alamsjah 2011; Beer and Eisenstat 2000; Pryor et al 2007), Johnson (1992) also acknowledged the role culture, in strategy implementation. He argued that culture constituted a set of beliefs and assumptions about the outside world, often so taken for granted, that they act as a filter when trying to make sense of the competitive environment (Johnson 1992). More recently Ahmadi et al (2012) made the link between organisational culture and strategy implementation. In this research, culture is viewed as a key structural element of the strategic context within which middle managers practice strategy implementation, it will be discussed in depth in chapter 3 to explicate key theoretical constructs for this study.

Atkinson (2006) also highlights the importance of middle managers to strategy implementation, acknowledging many published studies that establish link to successful implementation of strategy over many years (Aaltonen, and Ikåvalko 2002; Bartlett and Goshal 1996; Giles 1991; Marginson 2002). Middle managers are recognised as holding a pivotal role in the communication of strategy (Aaltonen and Ikåvalko H 2002), as having potential to resist (Bartlett and Goshal 1996) and having an important role in setting targets and performance measures (Decoene and Bruggerman 2006). Middle managers have a profound impact on strategy in organisations (Ahearn et al 2014; Guth and MacMillan 1986; Mantere 2008; Pappas and Wooldridge 2007; Rouleau and Balogun 2011;

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<sup>1</sup> The controls in situ are described in some depth in Chapter 5 (Section 5.2.4)

## Chapter 2

Wooldridge and Floyd 1990; Wooldridge, Schmid and Floyd 2008;) and thus the role and significance of middle managers is central to this thesis. In addition, where the consensus also arises in the literature is in relation to the multifaceted nature and complexity of the strategy problem. It appears that Alexander's opinion remains valid that the problem for strategy implementation stems for the fact that "we are not exactly sure what it includes, and where it starts and stops" (1991:73). Thus, strategy implementation remains a 'wicked problem' (Camillus 2008; Rittel and Webber 1973) with research studies endeavouring to find the key factors linked to success in strategy implementation, which change and recycle over time in the literature.

Notwithstanding these multiple prescriptions, a contemporary theme and trend is to accept strategy as a human issue (affective, behavioural and political). Even, Pappas and Wooldridge (2007) acknowledge that "new strategies emerge through a social learning process where new knowledge is created, ideas generated, and capabilities developed as managers and other organizational actors engage in complex social interactions" (2004:339). In the light of this, it will be argued that strategy needs to be reconceptualised with an emphasis on practice and agency, in line with the choices made in this study. The importance, complexity and multidisciplinary nature of strategy implementation has been established as well as the need to reconceptualise strategy. It has been shown that there is consensus surrounding the importance of middle managers, therefore this study addresses an area that is both worthy (Tracy 2010) and in need of further study.

Finally, it is worth noting that the importance of cultural controls is acknowledged by critical theorists as well. Raelin's treatise (entitled 'The end of management control' (2011:135), acknowledges that organisations are changing, and controls are changing too. His thesis recognises a new order stating that "under unrelenting pressures of globalisation, mass customisation and hypercompetition", changing patterns of technology and control result in "flatter increasingly virtual" organisations (2011:139). In this post bureaucratic era, there is an increase in soft control appropriate to the webs of partnerships, self-organising groups and project teams, that need new approaches to control.

Raelin acknowledges the role of culture, stating that "culture leads to an internalization of desired values and norms, which makes constant surveillance unnecessary" (2011:140). However, this is achieved through encouraging ideological conformity, through selection

and training processes and careful systematic communication and rewards systems. This can result in the paradox of self-control, where people feel they have more control, when in fact they are conforming more, i.e. the notion of the velvet glove (Raelin 2011). The issue of culture as control will be discussed again in more detail later, but it is sufficient to point out here the importance of culture in the context of strategic control and implementation. Also, that this new era of control relies upon empowerment and cultural control (Raelin 2011) embodied in the practices of organisational members, which is why this project focuses on the practice of middle managers. This emphasis on practice provides the motivation and necessity to engage with the literature on Strategy as Practice, which will be critically reviewed next.

### **2.3 Strategy as Practice – Agents in Context**

Strategy as practice (SaP) research has emerged from the “classics of strategy process research” (Golsorkhi et al 2011;3) as an alternative to orthodox strategic research, which is predominantly grounded in economic theories (Jarzabkowski & Spee 2009) based on assumptions of rational choice Jarzabkowski (2005 bk) and focussed on the effects of strategy on performance (Golsorkhi et al 2011). Traditionally strategy was viewed as something that belonged to an organisation (Whittington 2006) not something people did, and was studied at a macro, rather than a micro level. It was structuralist in ontology and functionalist in epistemology. Johnson, Melin and Whittington (2003) proposed an activity-based approach to understanding strategy, drawing upon two important bodies of work (the resource-based view and institutional theory), they argue for a shift to a micro level understanding of strategy, focussing on processes and practices. Increasingly, this discrete stream of strategy research (Herepath 2014) that views strategy as something enacted by human beings (Jarzabkowski, Balogun and Seidl 2007), and there is a drive to humanise strategy research and bring the individuals to the fore (Jarzabkowski & Spee 2009). Noting the contribution of Jarzabkowski (2000<sup>2</sup>) and Whittington (1996) amongst others, Hendry & Seidl describe it as a new wave of theorists who believe that “strategy research might usefully be advanced by framing it in context of social theories of practice” (2003:176). This research project is informed and inspired by the SaP movement and so it is important to explicate and critically evaluate the positionality of SaP and its contribution

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<sup>2</sup> Jarzabkowski 2000 is an unpublished PhD thesis, this research was later published in 2008.

to understanding middle management agency and strategy implementation and to justify a practice approach for the research question at hand.

### 2.3.1 Strategy as Practice - repositioning strategy research.

Paroutis, Heracleous and Angwin (2013) acknowledge that this exciting strand of strategic management discipline, brings to the fore, and draws researchers' attention to, artefacts, processes, activities and, importantly for this study, agency. Breaking free from strategy's deterministic antecedents (Bourgeois 1984), the SaP movement is arguably a response to the limitations of previous schools of thought (Mintzberg, Ahlstrand and Lampel 2009). SaP builds on and complements the generalizable, but somewhat parsimonious theories that are predicated on an agency-based economic theory (Jarzabkowski and Whittington 2008). Whittington (2011a) also acknowledges the influence of a growing body of organisational research utilising a practice lens, including in accounting, information systems, marketing, HRM and leadership. "Practice theory challenges the agent-based individualisms of economics and systems theory with a sociological sensibility" (Whittington 2011a:184). Heracleous acknowledged the impact of interpretive sociology on strategic management underpinning what he characterised as a "potent critique of the functionalist paradigm" (2003:23), critically augmenting the deterministic assumptions and arguably reductionist models prevalent in strategic management theory. As a result, SaP evolved in recent years in response to a growing interest in practice, it mirrors and is influenced by the 'practice turn' (Reckwitz 2002) and can be characterised alongside the 'linguistic turn' in social sciences (Alvesson & Karreman 2000). Empirical practice theory 'recognises the centrality of people's actions to organisational outcomes' (Feldman and Orlikowski 2011:124), SaP adopts this same stance that is still evolving in organisational research.

SaP research was conceived as the activity-based view of strategy, championed by researchers who recognised the need to respond to new economic circumstances. In this new era, competitive advantage is grounded "in micro assets that are hard to discern and awkward to trade" Johnson, Melin and Whittington (2003:4) and hyper-competition has led to rapid change and innovation. In this context, strategy needs to be a continuous process that involves more people, more often, rather than the cyclical deliberate processes of the past. The influence of a practice perspective means that SaP research focuses more

on human agency in the construction of strategy, through the practice of individuals within an organisation, thus shifting the ontology of strategy research. Previously strategy was something to be observed in the upper echelons of organisations, however, “strategy, according to this [SaP] view, is not something an organisation *has*, but something its members *do*” (Jarzabkowski et al 2007:6 - *emphasis in original*).

A key feature of SaP research is that it draws significantly on social theorists including Bourdieu, Foucault, Giddens, Goffman, Latour and others, grounding it firmly in theories of practice rather than theories and concepts from economics. Performance is thus interpreted much more widely beyond economic performance, to human agency and action (Vaara and Whittington 2012). “The power of this perspective lies in its ability to explain how strategy-making is enabled and constrained by prevailing organizational and societal practices” (Vaara and Whittington 2012:285). This wide range of social theorists has brought a new set of lenses to strategy research and has had an emancipatory impact. Giddens is widely utilised, providing the opportunity to recognise that social systems manifest themselves at various levels and that human agency has potential at all levels (Whittington 2011b). Giddens has been employed by various researchers including Balogun and Johnson (2005), Jarzabkowski (2008), Mantere (2008), Rouleau (2005), many of these studies acknowledging the agency of middle managers. Gomez (2011) demonstrates how Bourdieu’s praxeology can be brought to bear to understand strategy, utilizing his model of practice, which combines Habitus, Capital and Field within the social context. In this way it is possible to overcome the dichotomies of agency and structure. Foucault has been utilised to reveal power dynamics and discourse in strategy making, Allard-Poesi (2011) acknowledges that strategy making results from a dialectical process. Researchers such as Knights and Morgan (1991) see strategy as discourse, focussing on strategy as a ‘power-knowledge’ system (Allard-Poesi 2011:168), notions of power and intent, politics and discipline are prominent in Foucauldian based studies.

Giddens Structuration Theory is considered to be most appropriate to address the research question in this research which focusses on practice of knowledgeable agents, i.e. “doings” and opposed to discourse, “sayings” (Seidl and Whittington (2014). Specifically, Stones’ Strong Structuration Theory (SST) will be utilised, which is a respectful defence and development of Giddens’ Structuration Theory which integrates Bourdieu’s notions of habitus. This will be explained and justified in the next chapter.

Another key shift, as a result of SaP's new world view, is that strategy is not viewed as static "but constitutes reality in flux" (Golsorkhi et al 2011:7), occurring at all levels in the organisation. It is socially constructed through interactions of multiple individuals inside and outside the organisation (Golsorkhi et al 2011; Jarzabkowski and Spee 2009). SaP philosophy allows researchers to explore in detail the 'micro-level of social activity and its construction in a real social context or field' (Golsorkhi et al 2011:2), i.e. intra-organisational activity (Whittington 2006). There is also a need to conceptualise the wider extra organisational phenomena that stretch across industries and society.

Along these lines, Jarzabkowski and Spee (2009) overtly recognise the micro, meso and macro levels of strategy, acknowledging that human agency is manifest in different organisational domains. At a micro level focusing on that which is proximal to the agent, and spatially and temporally bounded such as a decision or a meeting. Meso level agency relates to activities at an organisation or sub organisational level, and macro studies are often associated with industries or professions (Jarzabkowski and Spee 2009). Although recognising these organisational strata, SaP focuses on individual human agency in a manner that previous research agendas have ignored. This research utilises SST to facilitate a target on the agents-in-focus, i.e. managers and their actions, whilst still acknowledging the strategic context, which provides a link between the micro, meso and macro dimensions of strategy implementation. SaP's epistemological and ontological shift also has implications for research methodology and research strategies, which will be discussed in more detail later, but it is useful to note here that in a recent review Vaara & Whittington (2012:291) revealed "a strong orientation towards qualitative methods, often in single organisations". In line with this, the methods utilized in this research study are qualitative methods.

There are other commendable features to SaP research, notably that it moves beyond the mainstream obsession with top management in large privately-owned commercial firms to focus on, a range of players, for example, middle managers, in a range of settings such as not-for profit settings, including universities and hospitals (e.g Rouleau 2005; Mantere 2008; Rouleau and Balogun 2011; Nordqvist and Melin 2010; Madigan and O'Shea 1997). Through an emphasis on practitioners and performance "more than just economic performance" (Vaara and Whittington 2012:291), in the SaP literature broadens the scope

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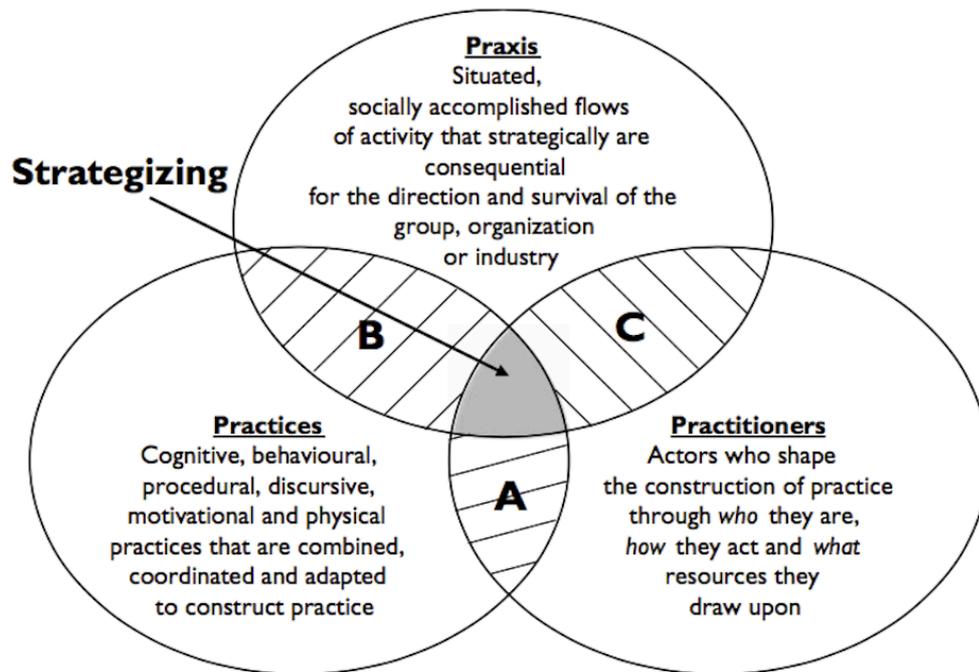
of past scholarship, to include performativity and practice. This turn to practice is also reflected in Jarzabkowski, Balogun, and Seidl (2007) editorial in *Human Relations journal*. They differentiate strategy from strategizing, and conceptualise strategy “as a situated, socially accomplished activity” (Jarzabkowski, Balogun, and Seidl 2007:7), Paroutis, Heracleous and Angwin (2013) share similar views, stating that strategizing can be seen as the work of strategy, which “encompasses all the continuous practices and processes through which strategy is conceived, maintained, renewed and executed.” (2013:7). However, they note the lack of agreed definition, they draw on a range of theorists including, Floyd and Wooldridge (2000), Johnson, Melin and Whittington (2003), Maitlis and Lawrence (2003), Whittington (1996) and Whittington (2003) to assemble a range of definitions which share common traits. These traits include a focus on micro level day to day activity, social interactions in a social setting, temporal continuity and change, enacting processes and practices over time, that result in the ongoing, development, realisation, reproduction and transformation of strategies.

Whittington (2006) provides further clarity by elaborating a stratified ontological model delineating Praxis, Practices and Practitioners. This is employed by Paroutis, Heracleous and Angwin (2013) to structure their textbook (entitling it *The 3P Framework*) and is recognised as widely used by Vaara and Whittington (2012). Explicitly reflecting on the practice turn and utilizing practice theory, Whittington (2006) proposes this elemental vocabulary for strategizing, drawing on Reckwitz (2002) to differentiate praxis, practices and practitioners. It forms the analytical framework for Jarzabkowski and Spee’s 2009 review of literature, who differentiate, “practitioners (those people who do the work of strategy); practise (the social, symbolic and material tools through which strategy work is done) and praxis (the flow of activity in which strategy is accomplished)” (Jarzabkowski and Spee’s 2009:70). Although it is possible to study these elements in isolation their interconnectivity must be acknowledged, such that Jarzabkowski, Balogun and Seidl (2007) presented this with a Venn diagramme showing the discrete and interconnected nature of the triad as shown in figure 2.1 below.

The activities involved in making strategy constitute praxis, this is where agency occurs and is a key focus in this study. The value of this framework is that it facilitates analytical separation and provides a common vocabulary for SaP research. This research will focus

on practitioners, in the form of Middle Managers and their Praxis in the form of day-to-day decision-making.

Figure 2.1 Practices, Praxis and Practitioners



Source: Jarzabkowski, Balogun and Seidl (2007:11)

It is important to take a critical view and this turn to a practice perspective is not unproblematic, walking the middle ground between traditional dualisms such as, determinism and voluntarism, agency and structure, is not necessarily easy. By concentrating on the agent-in-focus to delve into the detail, accepting the power of agents whilst acknowledging the causality of structures and systems, practice research faces criticism from both extremes. Herepath (2014) highlights the challenge of “a legacy of micro-myopia” (2014:1) that ‘taints’ the SaP field of research. Jarzabkowski and Spee (2009) still recognise that the “links between macro societal phenomena and micro managerial actions remain under developed” (Herepath 2014:1). Furthermore, Ahrens and Chapman (2007) acknowledges a common goal of practice theorists “who have been concerned to reflect on the ways in which action relates to aspects of context” (2007:4) and Vaara and Whittington (2012) call for more emphasis on the broader context of agency. This concern for ‘micro-isolationism’ is recognised in a recent special issue (Burgelman et al 2018), with Mantere drawing on Pettigrew’s reference to ‘flipping burgers’ (Mantere

2005:158). They promote a ‘combinatory’ framework to synthesise strategy process and strategy practice research, which brings together temporal and spatial factors into episodic strategy realisation. In a similar way (it will be shown in chapter 3) SST draws together structural facets of the strategic context to model agency in-situ to link the macro and micro environments. By utilising this theory, the researcher is responding to call for a situated understanding of SaP.

SaP as a school of strategic management research has also faced criticism from critical theorists and postpositivists (Bromily and Rau 2016; Carter Clegg and Kornberg 2008; Carter and Whittle 2018). Whilst acknowledging the influence and contribution of SaP, for example, bringing the social into strategy and increasing interdisciplinary collaborations, Carter, Clegg & Kornberg (2008) argue that it pays insufficient attention to politics and power and maintains a managerialist agenda. Leading scholars in the domain have responded to this (Jarzabkowski and Whittington 2008) with notable critical reviews of the field (Jarzabkowski and Spee 2009; Vaara and Whittington 2012). In addition, edited collections and text books have been published to develop and defend the disciplinary field (Golsorkhi et al 2011; Patroutis, Heracleous and Angwin 2013). Notwithstanding these criticisms, the value and contribution of a practice based micro level study has been established. It is clear that a SaP perspective is suitable for the research project at hand. Given this it is appropriate to examine in more detail the empirical SaP literature to establish relevant gaps in knowledge thus provide a rationale for a focus on middle managers.

### 2.3.2 Empirical studies in Strategy as Practice research

This selective review of the SaP literature is informed by key influential works and respected literature reviews, which together provide comprehensive coverage of the field. This review has also been informed by regular close review of the SaP International Network bibliography<sup>3</sup>). Conveniently for this researcher, two key articles provide a comprehensive review of the literature in the field, these are Jarzabkowski and Spee (2009) and Vaara and Whittington (2012), alongside the leading edited collection (Golsorkhi et al 2011), these constitute the most important and influential literature in the field. Drawing

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<sup>3</sup> SaP-IN is a collaborative academic network facilitated by a website with a comprehensive list of resources and bibliography of work in the field.

on these, a critical evaluation of the relevant empirical research will identify the themes and issues that are pertinent to this study. With a view to providing key constructs for this research and demonstrating opportunity to make a contribution to knowledge. Early contributions have been influential for the field, such as Hendry (2000) who drew upon Giddens Structuration Theory and discourse psychology to conceptualise strategic decision making as discourse reflecting strategy as an “appropriative social practice” (Hendry 2000:22). This work was empirically grounded and recognised as influential by Vaara & Whittington (2012), as it brought together the traditional (rational) perspective, with an action and interpretive perspective to characterise strategy as an emergent, interpretive act.

Jarzabkowski and Spee (2009) develop a typology of nine possible domains for SaP research, based on an analysis of 39 empirical and theoretical studies published between 2002 and 2008, 25 of which were empirical. They analysed all studies into three categories, according to the level of praxis (macro, meso and micro) as mentioned earlier. Macro studies accounted for thirteen in total, of which only three were empirical. Melin and Nordqvist’s (2010) investigation of family businesses and institutionalised practices and Hodgkinson et al (2006) explored the role of strategy workshops in the strategic development process. Lounsbury and Crumley (2007) drew on practice and institutional theory to model the creation of new practices in the US mutual fund industry. Other studies addressed the meso level, these included Hoon (2007), Jarzabkowski (2003 and 2005), Rouleau (2005), and Sillince and Meuller (2007). Hoon (2007) looked at the role of committees, Sillince and Meuller (2007) used qualitative methods and semi-structured interviews to understand the reframing of responsibility through the strategy implementation process. They found middle managers used linguistic devices including talking-up and later talking-down expectations. Jarzabkowski and Seidl (2008) demonstrated “the role of meetings in shaping stability and change” (2008:1391).

The research conducted at the micro level is closest to this study. Although none adopt the same theoretical approach, there are some interesting findings, which frame this research and point to the importance of middle managers and the need for more research. Bourque and Johnson (2008) explained how individuals participate in rites and rituals in strategy workshops and away-days and Beech and Johnson (2005) observed identity dynamics and their disruptive impact in a period of high-level strategic change. Samra-Fredricks (2003)

conducted an ethnographic study of strategizing practice, providing deep insights into discourse and the use of morals and emotions to construct a shared vision of the future, focusing on one influencer's relational-rhetorical discourses. She later published further from this work (Samra-Fredricks 2005) reconceptualising strategic practice as "an inter-subjective process of (contestable) validity claims" (2005:832) grounded in knowledge that forms discourse. She argues that this deep, more intricate, and critical view of the possibilities for action and the power effects, brought into the classroom, will change the dialogue of current and future practitioners (Samra-Fredericks 2005).

Molloy & Whittington 2005 published findings from a large data set from 8 organisations, including 90 interviews with a range of participants in strategic development. They observed a range of practices including project management, use of management theory and symbolic objects, but found the need for improvisation around standard practices. Whittington et al (2006) published again based on the same data set with additional cases, revealing the value of a practice perspective to promote 'craft' skills in strategy, associated with workshopping, project leadership and creation of symbolic artefacts to facilitate the strategy process.

Laine and Vaara's (2007) study is interesting because although focussing on strategy development rather than implementation, they reveal contested ways of sensemaking. Amongst other findings, middle managers are shown to resist hegemony by initiating "strategic discourse of their own to create room to manoeuvre in controversial situations" (Laine and Vaara 2007:29). Sillince and Meuller's study was categorised by Jarzabkowski and Spee (2009) as being at the micro as well as meso level (this in of itself shows the difficulty of drawing boundaries in this field of research). Their findings also extended the understanding of where in the hierarchy strategizing takes place. They observed "it is the middle managers who take the risks" (Sillince and Meuller 2007:169) in the face of top management ambivalence, they also observed "an exchange of responsibilities between top and middle managers. This and many other studies clearly implicate middle managers as key strategic actors and show they remain valid subject for research (Hendry 2000; Rouleau 2005; Whittington 2006). Jarzabkowski and Spee's review of the literature shows a dominance of qualitative methods, application of social and organisational theories and regular focus on the role of middle managers especially research focusing on

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implementation rather than planning and development of strategy. Notably there is evidence of multiple theorising from rich data sets, developed collaboratively over time.

Vaara and Whittington's (2012) review includes only those empirical studies explicitly and substantively drawing upon SaP literature published in leading journals since 2003. Their review included, 24 studies focusing on Practices, 18 on Praxis and 15 Practitioners and in conclusion they proposed 5 research directions. This comprehensive review revealed "a variety of practices that have significant enabling and constraining effects on strategy-making" (2012:324) and the accomplished skill of practitioners and the temporal or episodic nature of strategic practice (Vaara and Whittington 2012). Reprising the developments in SaP research they recounted the distinctive features of SaP (already presented above) then presented empirical research foregrounding practices. Making explicit the theoretical underpinnings they showed how scholars have utilized social theory and general practice theory. In addition, many scholars utilised specific social theorists to illuminate their research questions. These are selectively mapped in table 2.1 to give an overview of the authors and theories utilized.

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Table 2.1 Selective examples of the use of practice and social theories.

|                         |   |
|-------------------------|---|
| Discourse theory        | Balogun et al 2011; Clarke et al 2011; Laine and Vaara 2007; Mailis and Lawrence 2003; Mantere and Vaara 2008; Vaara, Kleymann and Seristo 2004; Vaara, Sorsa and Palli 2010. |
| Practice theory         | Faure and Rouleau 2011; Hodgkinson et al 2006; Jarzabkowski and Fenton 2006; Kaplan 2011; Molloy and Whittington 2005; Regnér 2003.   |
| <u>Social Theorists</u> |   |
| Foucault                | Ezzamel and Willmot 2008; Kornberger and Clegg 2011.  |
| Latour                  | Giraedaeau 2008; Cabontous et al 2020; Whittle and Meuller 2010   |
| Giddens                 | Jarzabkowski 2008; Mantere 2005; 2008   |
| Bourdieu                | Gomez and Bouty 2011  |
| Garfinkel               | Samra-Fredericks 2003   |
| Weickian-sensemaking    | Balogun and Johnson; Rouleau 2005; Stensaker and Falkenberg 2007;   |

Extracted from Vaara and Whittington's (2012)

Much of this research has already been highlighted above, but some studies are worthy of note as they inform or are close to this study. Vaara & Whittington advocated the value of understanding praxis claiming one of the strengths of a practice approach was to “uncover the activity “inside” practice (2012:298). One of the key directions in SaP research, which is relevant to this study, was to extend the focus onto the role of middle managers (previously strategy was considered to be practiced by top managers). This strand of SaP research inspired and informed the research design in this study, in particular, empirical studies by Mantere and Rouleau were of interest.

In two published articles, Mantere draws on a large data set from 301 interviews, including top managers, middle managers and operatives, conducted across 12 organisations. Firstly, he identified 159 champions i.e. people who tried “to influence strategic issues larger than their own immediate responsibilities” (Mantere 2005:157). Among the many findings, he found a range of practices both recursive and adaptive, reporting that “middle managers are most hampered by the lack of proper recursive control practices for such issues as rewarding, performance evaluation, resource mobilisation and participation” (Mantere 2005:178). In the later article, he analysed 262 interviews to argue that role expectations

affect strategic agency in an enabling and constraining fashion (Mantere 2008). He found eight enabling conditions including, narration, contextualization, resource allocation, respect, trust, responsiveness, inclusion and refereeing and advocated a “reciprocal view of strategic role expectations, which elucidate the tensions between dialogue, legitimacy and rationality” (Mantere 2008:294). What is interesting about these studies is that Mantere 2008 emphasises the role of agency, drawing on Giddens (1984) to move away from a functional conceptualisation of middle managers role, focusing on the issues and facets of the social context and interactions that enable and disable managerial agency in strategy implementation. Importantly the notion of reciprocity between top and middle management is important and crucial to the function of the eight enabling factors. “For middle manager agency to take place, reciprocal actions by the top management is needed for the fulfilment of these roles” (Mantere 2008:309).

Rouleau’s (2005) study was influential for the researcher because she brought together the institutional realm (in the form of sociocultural setting) and the sematic domain (Giddens 1984) which arguably preside in the agents practical (tacit) knowledge. Rouleau therefore brought together the agency of middle managers with the structures of meaning. Rouleau exposed the skilful sensemaking and sense-giving activities of middle managers. Although situated in a very unique research setting of a Canadian top-of-the-line women’s clothing organisation, this study has similarities with the research in this thesis. As will be eluded to, Hotel GMs in this study have to communicate with multiple stakeholders and sell the strategy to owners. In Rouleau’s study MM utilized routines and conversations translating, overcoding<sup>4</sup> strategy, disciplining the client and justifying the change, this reflexive skilled behaviour is predicated on practical consciousness (Giddens 1984). Rouleau’s research is similar and yet different enough to support the justification for this study in terms of its importance and validity.

The influential publication of readings edited by Golsorkhi et al published in 2011 identified various important themes. These included, strategizing methods in different settings, formal strategic practices, sensemaking in strategizing, discursive practices of strategy, roles and identities in strategizing, tools and techniques on strategy, and power in

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<sup>4</sup> Overcoding is “the act of inscribing words and actions around strategy in the appropriate professional and socio-cultural codes of the interlocutor is called overcoding” Rouleau (2005:1426)

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strategy (Golkorski et al 2011:5). This collection is organised into four sections addresses ontological and epistemological issues, theoretical directions, methodological tracks and applications. This has informed much of the review above but especially valuable for this study was the chapter entitled *Giddens, structuration theory and Strategy as Practice*, by Richard Whittington. This chapter built on his 1992 treatise and demonstrated how several early structurationist studies in the SaP field “supported close examination of middle manager conduct” (2011b:123). Whittington argues that Giddens structuration facilitates the analysis of strategy as practice whilst understanding the institutional context. In the next chapter there will be a full explication of Structuration theory and its application to strategy and management research.

The penultimate contribution in Golkorski’s collection is Laine and Vaara’s contribution, which explores discourses of subjectivity. They argue that subjectivity and discourse are closely linked, acknowledging that “organisational discourses have ontological power; they define concepts, objects and subjectivities (2011:311), but also that “actors employ specific discourses and resist others precisely to protect or enhance their social agency and identity” (Laine and Vaara 2011:310). As reported above this reveals how middle managers use discourse to resist hegemony. This collection brings together leading authors in the field, however much of the content has been published elsewhere and has been reviewed above.

There is one final influential contribution which is worthy to note at this stage, that is, Pozzebon’s (2004). Her review of strategic management research using Structuration Theory from 1995 – 2000. She confirmed its ability to avoid the dichotomist approach to micro and macro perspectives, voluntarism and determinism and recognised the multiple theoretical approaches in the literature. She observed that Giddens was being widely used, with many studies taking an institutionalist perspective. She argued that there are alternatives, but it is “a question of ontological affinity than of making the ‘better choice’ among competing accounts” (2004:247). In this study, the researcher is focussed on the micro agency, this complements the dominant institutionalist approach. Pozzebon’s work will be discussed again later in more detail, along with other contemporary authors (Elbasha and Avestisyan 2018; Elbasha and Wright 2017) when addressing the approach to structure and agency (in Chapter 3).

In conclusion, it is useful to return to the findings from Vaara and Whittington (2012), who made recommendations for the future of the field and proposed key research agendas including: -

- Calling for “more analysis of agency as placed in a web of social and discursive practices” (2012:324)
- Exploring in more depth the emergence in strategy making and the “material aspects of social practices” (Vaara and Whittington 2012:324)
- Critical analysis of the taken-for-granted aspects of social practices.

This research is situated firmly at the point of the agent in context, thus addresses the first area directly. It has been shown that although there are a range of studies focussing on MM, none are utilising Giddens in combination with culture in such a manner as this study. Thus, it is expected that this study will reveal something novel in the field of SaP. Having established a space and place for this research project to make a contribution within the SaP domain, it is now appropriate to review the extant knowledge relating to middle managers and Hotel General Managers in particular, who are the agents-in-focus in this study.

### **2.4 Middle Managers – Agents-in-Focus**

Research focusing on middle managers extends from early studies such as Likert (1970) who characterised them as ‘linking pins’ to more contemporary studies recognising their liminal position in the hierarchy (Floyd and Wooldridge 2017; Harding, Lee and Ford 2014). Much of this work emanates from a functional positivist perspective, but it is important to define middle managers and understand what is known about MM roles and justify their position as a worthy subject for this research.

#### **2.4.1 The importance and definition of MM**

The importance of middle managers has been recognised in many fields of scholarship; in strategic research (Aaltonen and Ikavalko 2002; Balogun & Johnson 2004; Floyd and Wooldridge 2017), management research (Ahearne, Lam and Kraus 2014; Alamsjah 2011; Brubakk and Wilkinson 1996a; Thomas and Linstead 2002), in SaP (and Mantere 2005;

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Sillince and Mueller 2007), accounting research (Faure and Rouleau 2011), and also applied hospitality research (Brownell 1992; Burgess 2012; Ritchie and Riley 2004). Middle Managers are at the nexus of strategy and operations, mediating the needs of customers and employees with corporate agenda and (in a hotel setting) owners' expectations (Bartlett & Goshal 1996; Floyd & Wooldridge 1997; Hodari et al 2018; Mia and Patiar 2002; Rouleau and Balogun 2011; Thomas & Linstead 2002; Xiao et al 2012). Wooldridge, Schmid and Floyd (2008) completed a review of 25 years of research in strategic management focusing on MM identifying the antecedents, processes and outcomes associated with their agency. The central and critical importance of their role remains a result of their unique position in the organisational structure, where they intersect the implementation of strategy and management control (Floyd and Wooldridge 2017).

Aaltonen and Ikavalko (2002) studied of 12 service firms interviewing 298 participants from top management to front line personnel, they found that middle managers role was pivotal in strategy implementation. Faure and Rouleau (2011), recognise the importance of middle managers, focusing on their collaborative practices with accountants in budget making. The importance of middle managers in service industries is amplified by the characteristics of services and service firms. Service businesses are real time operations, often geographically dispersed (Korcynski 2002), highly dependent on labour in the production processes (Ritchie and Riley 2004) and with high degrees of uncertainty resulting from the involvement of customers in the production processes (Brownell 1990; Krone et al 1989; Lugosi 2019). These characteristics produce challenges for strategic control and measurement (Modell 1996) and result in less programmable decisions and the need for high levels of delegation and local decision-making, characterised as 'messy' by Ritchie and Riley (2004). In particular in the hotel industry General Managers have long been recognised as important, even critical (Hodari & Sturman 2014), Woods et al state that, "no other single position has greater effect on the success of a hotel property" (1998:38).

Although aspects of this study are contested and contestable, the unequivocal agreement in the literature of the importance of middle managers continues in contemporary studies (Livijn 2019). This important central agentic position justifies the focus on middle managers in this study. Floyd and Wooldridge (2017) assert that "there is still a significant difference of opinion about who middle managers are" and their role and influence on

strategy (2017:2), therefore is it important to maintain a critical perspective. It is also important to counter the dominant discourses in the literature, Thomas and Linstead (2002) denounce the polarised (pessimistic or optimistic) perspectives of MM, based on simplistic and functional studies, that take either a negative or positive perspective on the state of middle management. They advocate a more nuanced detailed picture of MM, providing insights in relation to identity and discourses. This research also adopts a social constructionist approach to complement extant literature.

The definition of middle managers is by no means unproblematic, is often imprecise and there still remains a need for clarification (Castañer and Yu 2017). By its very nature, middle is a relative rather than absolute concept and thus must be defined in context. Ouakouak, Ouedraogo & Mbengue (2014) state that there “is no universally accepted definition of a middle manager” (p.306), middle managers inhabit a central position within a hierarchy and thus the nature and scope of their role will be dependent on the size and structure of that hierarchy and where boundaries are drawn. The role of middle managers is not only contingent and contextual, it is changing. For Mintzberg, middle managers are situated ‘between the operating core and the apex’ (1989:98), but as organisations adopt flatter hierarchies they are increasingly closer to the strategic apex (Kanter 1989). Dopson and Stewart’s inclusive definition “takes in all those below top management and in large companies, the divisional board.” (1990:12), Wooldridge et al (2008) also accept a broad definition of middle management, extending it “to managers located below top managers and above first-level supervision’ (2008:1192). Lis, Glinska-Newes and Kalinska (2015) state that "middle managers operate directly below the top managers and perform much of the day-to-day work within the organisation. They are responsible for making many trade-offs that shape the company's success." (2015:34). Thus, it is arguably a liminal position in the organisational hierarchy (Harding, Lee & Ford 2014), at the boundary between top management and operational staff, at the threshold of accountability and control, and bridging different sociocultural contexts, this ‘in-between’ role is pivotal and complex.

It should be emphasised that many definitions are very broad and can encompass several hierarchical levels. What constitutes a MM will be different for different industries “dependent on which organisation and which industry is being discussed” (Brubakk and Wilkinson 1996a:163). It is argued that Hotel General Managers (the focus of this study) can be classified as Middle as opposed to Top Managers for the purposes of understanding

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strategy implementation. This is in contrast to Brownell's treatment of MM, who were separated from GMs in her study of communication practices. It appears this differentiation arose initially from 5 focus group meetings with managers in the hotel industry. She bifurcated her population for follow-up questionnaires stating, "[m]iddle managers were defined as department or division heads; a general manager was identified as the top executive at a particular property holding the title of general manager." (Brownell 1992 :115). In contrast, in this study GMs are considered the middle managers, due to the organisational boundaries drawn in this particular study. This study is focusing on an international hotel group and the implementation of strategy across a region encompassing multiple units, thus in this context GMs are considered to be MM. In line with theorists above, GMs are MMs reporting directly to top regional managers and being the first line manager for HoDs (Heads of Department) in the units (Huy 2002; Kanter 1989; Lis et al 2015; Mintzberg 1989; Wooldridge et al 2008).

This relativist liminal position of middle managers, results in dual accountability and responsibility, a unique dual perspective (both upward and downward in the hierarchy) and positionality in relation to control (Castañer and Yu 2017; Harding, Lee & Ford 2014). Middle Managers are at the nexus of control, with a dual role; they exert, and are subject, to control, identified as 'linking pins' (Floyd and Wooldridge 1992:154). Storey acknowledges that middle managers can "be seen as occupying a contradictory location within the social structure of production. They are at once both controllers of labour and themselves objects of control." (Storey 1985b:283). Rouleau and Balogun, acknowledge the need for middle managers "to influence upwards as well as laterally and downwards" (2011:954). This makes Middle Managers unique, as Harding, Lee & Ford state, "middle managers are unique in that they are controllers who are also controlled, and resisters who are also resisted" (2014:1232)<sup>5</sup>. Interestingly, their research was based in the NHS and they call for more research in profit orientated organisational conditions (Harding, Lee & Ford 2014).

This position arguably makes middle managers inimitable special and accounts for their epithet 'lynchpin' (Balogun and Johnson 2004; Wooldridge et al 2008). As the evolution

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<sup>5</sup> This notion of resistance will emerge later in the discussions on control and agency.

of the post-modern organisation continues into the information age (Cash et al 1994), globalisation and experience economy (Bharwani and Talib 2017; Pine & Gilmore 2011), relationships and structures are reconstructed, tall hierarchical structures become flatter, organisations delayer structures to become network organisations (Bartlett and Goshall 1996; Brander Brown and Atkinson 2001). Thus, the role, scope and scale of middle managers responsibilities, has been, and is continuing to change (Dopson and Stewart 1990, 1994; Lis, Glinska-Newes & Kalinska 2015) making them a worthy focus for research (Tracy 2010).

### 2.4.2 The role of Middle Managers

The role of middle managers is contextually grounded and ever changing. Middle managers have multiple and conflicting roles, these roles have been documented and critiqued over time (Brubakk and Wilkinson 1996a; Floyd and Lane 2000). Fayol's early work remains a reference point where he described the functions of management as planning, organising, commanding, coordinating and controlling (Golden Pryor and Taneja 2010:491). The role of middle managers was most famously critiqued and elaborated by Mintzberg in 1973, in this enduringly influential work, he identified ten roles of management, in three categories. These categories were; Interpersonal (IP) including, figurehead, leader and liaison; Informational (IN) managers as monitor, disseminator, spokesperson; and Decisional roles (D) as entrepreneur, disturbance handler, resource allocator, negotiator. (Mintzberg 1973; 1990:6). This seminal piece has been a touch point for many researchers (e.g Brubakk and Wilkinson 1996a; Dann 1990; Hales and Nightingale 1986; Nebel and Ghei 1993; Mantere 2005, 2008; Rouleau 2005), albeit criticised (Chareanpunsirikul and Wood 2002; Hales 1999; Willmott 1987<sup>6</sup>). Mintzberg later republished his thesis with commentary bringing it more up to date, reflecting on the two facets of management; the 'cerebral' and the 'insightful' face of management (Mintzberg 1990). Arguing that the 10 roles "de-compose the job more than capture the integration" (1990:8) and recognising that there needs to be a balance of the two facets, he

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<sup>6</sup> For example, Willmott (1987) critiqued influential management studies such as Mintzberg and Kotter for underplaying the importance institutional context on the nature of managerial work, proposes the use of structuration theory to recognise the socio-political nature of the evolution of managerial work.

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proposed several key skills including developing relationships with peers, motivating staff, resolving conflicts and “making decision in conditions of extreme ambiguity” (Mintzberg 1990:12) and he argued that insight has a significant influence on managerial effectiveness. This decision-making and insight will be the subject of this research.

Although there has been a continued revolution in the way companies compete communicate and organise themselves since Mintzberg’s original ideas were published, (Floyd and Lane 2000), these notions are still recognisable in later empirical work. Floyd and Wooldridge argued that “as boundary spanners..... (middle managers).. mediate, negotiate and interpret connections between the organisation’s institutional (strategic) and technical (operational) levels” (1997:466). Previously, in 1992, they developed a typology of middle manager roles relating to strategy definition and implementation; these are Championing, Synthesizing, Facilitating and Implementing. Acknowledging these roles as a ‘synthesis of action and cognition unique to the position of middle managers’ (1992:154) they develop a 2x2 matrix showing integrative and divergent ideas, and upward and downward activity (Floyd and Wooldridge 1992). Their work can be linked to Mintzberg’s ten roles of management as shown in table 2.2 below, although this interpretation can be challenged and may be a little simplistic, it serves to demonstrate that there is continuity in the literature relating to managerial roles over time.

Floyd and Wooldridge (1997) continued to show that “middle managers in boundary spanning positions reported higher levels of strategic influence activity” (Wooldridge et al 2008:1197). Floyd and Lane (2000) continued to develop their work mapping role conflict in strategic renewal relating to hierarchical level recognising the difference in temporal, informational and values of managers. Much research has built on these seminal studies, yet Pappas and Wooldridge (2007) claim that “while the importance of middle manager’s strategic activity has been recognised” (2007:323) explanation for how (and why) managers participate in strategic activities is less clear. This study addresses the ‘how’ of middle management strategy implementation.

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Table 2.2 Mapping Mintzberg to Floyd and Wooldridge

| Floyd and Wooldridge 1997 |   | Mintzberg Roles 1990<br>(category initials)   |
|---------------------------|---|---|
| Synthesizing              | <ul style="list-style-type: none"> <li>• Gather information on feasibility of new programmes</li> <li>• Communication activities of competitors and customers</li> <li>• Assess changes in external Environment</li> </ul>  | Monitor (IN)<br><br>Liaiser (IP)<br><br>Monitor (IN)  |
| Championing               | <ul style="list-style-type: none"> <li>• Justify and define new programmes</li> <li>• Evaluate the merits of new proposals</li> <li>• Search for new opportunities</li> <li>• Propose programmes/project to higher level managers</li> </ul>  | Figurehead and Leader<br>Leader (IP)<br><br>Monitor (IN)<br>Entrepreneur (D)                                      |
| Facilitating              | <ul style="list-style-type: none"> <li>• Relax regulation to get new project started</li> <li>• ‘Buy time’ for experimental programmes</li> <li>• Locate and provide resources for trial projects</li> <li>• Provide safe haven for experimental programmes</li> <li>• Encourage informal discussion and information sharing</li> </ul> | Entrepreneur (D)<br><br>Resource allocator<br><br>Resource allocator<br><br>Disturbance handler<br><br>Negotiator |
| Implementing              | <ul style="list-style-type: none"> <li>• Monitor activities to support top management objectives</li> <li>• Translate goals into action plans</li> <li>• Translate goals into individual objectives</li> <li>• Sell top management initiative to subordinates</li> </ul>  | Figurehead and Monitor<br><br>Disseminator<br><br>Leader and Spokesperson   |

Adapted by author from Floyd and Wooldridge 1997:467 and Mintzberg 1990

The post-modern era is characterised by “unrelenting pressures of globalisation, mass customisation, and hypercompetition” and “most large organisations have become flatter and increasingly virtual.” (Raelin 2011:139). In this context middle managers roles have changed, Brubakk and Wilkinson 1996a found that in period of radical change, due to technology, crisis and recession in the financial sector the role of a branch manager was changing. In Brubakk and Wilkinson’s (1996a) study, recognises the context for branch managers who experienced a loss of status and power, which affected the ‘Interpersonal role’ negatively requiring both role and personal change. The ‘Informational role’ became more important due to uncertainty and need to facilitate a change of culture. Finally, managers lost ‘Decisional role’ powers as changes in information systems, facilitated

centralised decision making. This demonstrates that, although the fundamental elements of the role of middle managers endures, the manner in which it is enacted, and the power and authority associated with it, changes with technology and with changes in corporate strategy and structure. Many studies that draw upon Mintzberg's and Floyd and Wooldridge's work develop hypothetical-deductive studies that vainly search for truth (Thomas and Linstead 2002) and typified as reductionist (Hales 1999:335).

The changing fortunes of middle managers are widely accepted (Thomas & Linstead 2002), the effect of delayering, restructuring and the sociotechnical advances in post-modern organisations, results in popular discourse about shrinking prospects for middle managers, painting a negative story. However, Dopson and Stewart (1990; 1994) reflect on this pessimistic view of middle management prospects, in the light of an empirical study across six European countries. They acknowledge the reasons for dissatisfaction in middle management, which include; "being in the middle of a long hierarchy" and "having to cope with conflicting expectations" (Dopson & Stewart 1994:57-58). They criticise the dominant discourses as negative, evidentially 'sparse', grounded in particular instances of change and competition (Dobson and Stewart 1994). They proffer a more positive outlook for middle management, associated with a need for increased flexibility, more broad skill set, including financial knowledge, and an increased ability to manage people (Dopson and Stewart 1994). Grounded in a different worldview, Thomas and Linstead propose an epistemological shift to incorporate the broader macro-structural level of analysis with a focus on "the microlevel to understand *how* individual middle managers' enactment might reproduce" those structures (Thomas and Linstead 2002:73 emphasis in original). This study follows this call and therefore addresses an important facet of understanding life in the middle of organisations.

Having critically evaluated the changing role of middle managers and demonstrated the utility and limitations of major frameworks to describe what managers do there is a need to adopt situated explanations of middle managers' agency. (Hales 1999; Willmott 1987). Hales observes the gap between management theory and studies of managers, he proposes a skeletal "theory of how the defining characteristic of managing – responsibility – is shaped by the resources, cognitive rules and moral rules of social systems" (Hales 1999:347). This doctoral study addresses these calls, employing structuration informed framework to understand managerial agency in its socio-economic and political context.

Many research studies have recognised the contribution middle managers make in organisations, in terms of mediation and communication both vertically and horizontally and across boundaries. Wooldridge, Schmid & Floyd cited Burgelman's 1994 study that revealed "the importance of middle managers as vertical *mediators* between top and operating levels" (2008:1195) which adds to Bartlett and Goshall's earlier study that found middle managers to be pivotal "horizontal integrators of strategy and capabilities" (1993:44) in what they termed the "N-form" organisation (Brander Brown and Atkinson 2001). This boundary spanning communication is recognised as a key element of the crucial role played by middle managers in organisational change and strategy implementation, enabling them to provide a link between organisational strategy and day-to-day actions. For Floyd and Wooldridge (1997) these 'boundary spanning' activities provided links between the external organisational environment and internal communities. Brownell (1990) explored the communication practices of hospitality managers in Hotels, utilizing focus groups and questionnaires, she identified managers' boundary spanning role. She found vertical communication inside the organisation, 'translating expectations and rules to those below" (Brownell 1990:199), whilst conveying needs and worries from lower levels to senior management.

Raelin (2011) reflects on the changing nature of organisational control, recognising the need for new approaches to management. Advocating the term 'weaver'<sup>7</sup> (2011:148) rather than boundary manager, to describe the support role middle managers play in supporting teams or networked groups. Raelin's 'weavers' "work *on* the system rather than *in* the system" (2011:148 *emphasis in original*) to address problems of coordination with other teams, customers and broader stakeholders, and build social capital. In addition, he acknowledges the need for a facilitator role to curb coercive peer controls and develop independent and interdependent behaviours. Raelin (arguably a Radical Humanist in terms of Burrell and Morgan's (1979) paradigmatic framework) takes a critical perspective to postulate that the move to 'soft' alternatives (2011:135) democratising control which makes the role of Middle Managers more important not less. It can be argued that this is further evidence of a changing role and continued importance for middle managers and highlights the complexity inherent in sociocultural processes of strategic control. This

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<sup>7</sup> A term drawn from social network field.

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research will explore the sociocultural context of strategic implementation and control with the aim of revealing the agency of middle managers.

Rouleau and Balogun (2011) emphasise the craft of middle managers in their day-to-day practice, drawing upon a ‘mosaic of underlying knowledge (2011:956). Some of their work has been briefly discussed within the SaP literature earlier, but at this stage it is useful to note the findings from this study alongside Hales 1999. Rouleau and Balogun (2011) draw on data from two previous studies to analyse the narratives of practice and reflective focus group testimony to elaborate existing theory. They observed “different symbolic/verbal representations with different stakeholders” (2011:959) grounded in the context of “social/cultural systems such as an emphasis on Bottom-line performance to the exclusion of virtually anything else, or power dependencies, or social networks.” (Rouleau and Balogun 2011:959). This reveals more about the capabilities of middle managers to facilitate strategic sensemaking and confirms the complex and accomplished nature of middle manager agency.

Middle Managers have been widely accepted as critical to balancing the tensions between competing demands of different control systems (Frow et al 2005) and bridging the tensions and dissonance created by change when “cultural and structural factors impact on individual and organisation expectations” (McConville 2006:637). Seal and Mattimoe’s study of hospitality businesses, found inherent tensions in strategic control systems, that set up dialectical pressures between head office and units and between functional departments within units. These complex and competing priorities and rhetorical themes (topoi) were integral aspects of the strategic control systems. In the context of luxury hotel business the GM characterised as a conductor managing these tensions (Seal and Mattimoe 2014). The notion of balancing or mediating tensions occurs in many organisational settings McConville’s research (2006) was based in public services, focusing on cultural change and Human Resource Management strategies in the National Health Service. Thus, it is argued that the importance of the role of middle managers is categorically accepted and that this agency demonstrates multiple skilled behaviours, including communicating, sensemaking, boundary spanning, and mediating.

This mediating role is emphasised in situations of change, Balogun (2003) studied the role of middle managers in the context of a privatised utility company in the UK undergoing a

strategic reorientation. This longitudinal study using diaries revealed how middle managers “fulfil a key ‘change intermediary’ position during implementation” (2003:69). Balogun’s study counters the conventional view that middle managers are blockers and resisters of change. Acknowledging Floyd and Wooldridge’s view that they have a key strategic role to play (1994), Balogun warns that it is important to understand that this role is hard and increases the pressures on managers who are often already working long hours (Balogun 2003). The research calls for greater understanding of those factors that constrain or enable middle managers intermediary role and acknowledge that if these pressures are not acknowledged they could “become resistant out of resentment” (Balogun 2003:82). Although the context of this study is both culturally and temporally distinct from Balogun’s study, with a different scale of change, it affirms the need to understand the complex and important role of middle managers take in strategic change. This is also acknowledged by Balogun and Johnson (2004) who state that “[R]esearchers need to understand how middle managers interpret change, and how their schemata, or interpretive frameworks develop and change” (2004:523), this research seeks to explore this with particular emphasis on how middle managers draw in their own resources and capabilities to mediate strategy implementation and hence addresses an acknowledged gap in the literature.

The final section of the literature review now turns from the generic to the specific, to the agents-in-focus and the context for their agency, by describing the unique characteristics of the hospitality industry and hotels in particular and the role and the nature of the Hotel GM role.

### **2.5 Agents in Context, Agents-in-Focus**

To complement the generic research presented above and to provide further underpinning for the study, it is useful to review the literature relating to Hotel GMs, so reveal the state of the field in applied hospitality research. This will expose any gaps in the extant knowledge which this study can potentially fill. In keeping with social constructionist approach, it is important to keep the social context in mind, so it is beneficial to briefly review the literature that describes the industry characteristics and their implications for the implementation of strategy in hotels. Although it is recognised that this literature, “tends to be dominated by quantitative research and positivist epistemologies” (Lugosi,

Lynch and Morrison 2009:1467) it is necessary to acknowledge what is known about the context i.e. the strategic terrain within which the agents-in-focus must operate.

### 2.5.1 The international hotel industry

This research is conducted within the context of a complex service organisational setting of a full-service upscale international hotel company. Service organisations provide a rich and fertile arena for research into strategy implementation as they exhibit particular characteristics<sup>8</sup>; these result in a complexity not experienced in other commercial settings. Services exhibit higher levels of complexity and uncertainty (Brignall and Ballantine (1996) which provides challenges for management. Difficulties in defining cause effect relationships (Modell 1996) and the recognition that in circumstances where task and outcomes are not programmable, means that strategic control systems need to rely on clan and social controls (Langfield-Smith 1997; Ouchi 1979). Social and Clan controls are important in services (Auzair and Langfield-Smith 2005), this cuts to the heart of the operation of agency by middle managers and forms the structures within in which day to day decisions are made. The characteristics of services, in particular heterogeneity and simultaneity, also mitigate against tight strategic articulation, Brownell argues that ambiguity can be viewed as desirable, to galvanise the diverse workforce associated with services, and Hospitality in particular, but requires a clear understanding of strategic context (Brownell 1990; Brubakk and Wilkinson 1996b).

The position of the customer at the heart of the production process is a key facet of services, Brownell identifies them as “partial employees” (Brownell 1990:195). The role of the customer is complex and introduces uncertainty to organizational settings (Ritchie and Riley 2004), customers become agents in the delivery of strategy (Brownell 1990) which is a unique feature of the strategic context for MM agency. The importance of customers combined with the perishability of the product/service means that these real-time 24/7 businesses must adopt a market orientation. The focus is on service quality as well as revenue generation, particularly in hotels, where there is a high proportion of overhead and unallocated fixed costs (Harris and Mongiello 2001).

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<sup>8</sup> Five key service characteristics: - perishability, intangibility, inseparability, simultaneity, variability for full explanation see Maister and Lovelock 1982; Silvestro et al 1992; Modell 1996).

This orientation imbues the culture and influences control mechanisms and strategies, although Paraskevas notes that the focus on (external) customers should not obscure the importance of employees, what he calls internal customers (Paraskevas 2001b). The implications of this real-time market-orientated environment and the customer focussed strategic context is that hotel businesses are fundamentally people businesses (Hirst in Boella and Goss-Turner 2020). It is the dependence on “face to face interactions between employees and customers” that means “human resources play a key role” in customer satisfaction and performance (Madera et al 2017:48). The importance of labour in the production process, is widely acknowledged, so along with other service organisations a range of HRM techniques are adopted such as careful selection, high quality training (Korcynski 2002) and the use of management by values and cultural controls. In a study of European hotels, Mongiello and Harris (2006) observe the adoption of management by values, which they propose as “effective in addressing network features of multinational hotel companies” (2006:376).

Service organisations are usually geographically dispersed, to facilitate co-production of services close to customer need (Korcynski 2002), dispersing the operational units (Ritchie and Riley 2004). Geographic location results in remote control and accountabilities and independent business units lead by a unit manager. These organizational divisions are often treated as SBUs and GM thus is a managing director figure in his own unit (Gannon, Roper and Doherty 2010). This feeds into issues of autonomy and power as will be discussed later. It is acknowledged that “the main form of control in implementing strategy has been through the agency of General Managers (GMs)” (Roper et al 2001:21). This feature is widely recognised as increasing the challenge of “distributed and interactive leadership” (Wooldridge, Schmid and Floyd 2008:1191) and importance of middle managers, with distant and diminished senior leadership and need for local adaptation (Balogun and Johnson 2004). This research will reveal how GMs draw upon the dual structures emanating from the central head office and the local unit primacies.

In addition to these characteristics of services, hotel companies face additional industry-centric factors that have a bearing on strategy implementation and control. Hotels are constituted of multiple businesses or functions under one roof. Brander Brown and Harris (1999) state that hotels incorporate three significantly different kinds of businesses within

a single unit. For GMs it is likely that some of these separate business functions are outsourced, including rooms, leisure and restaurant (Laminmakki 2005; Laminmakki 2008; Roper 2018). Along with the real-time 24-hour nature of the business, this adds complexity to the strategic tensions affecting leadership and decision making of these crucial middle managers (Hodari, Turner and Sturman 2017; Seal and Mattimoe 2014). There is consensus that in hospitality industry MM are crucial, for example, Edgar and Nisbet (1996) applied chaos theory to argue that, the above reasons, formal strategic planning is of little value and that "managerial focus should emphasize innovative and creative practices in order to sustain competitive advantage" (1996:6). Also, Roper et al (2001) conducted a large interdisciplinary study of the hotel industry, reporting on a single group who were pursuing international standards, but allowing local flavour. They found "the main form of control in implementing this strategy has been through the agency of General Managers (GMs)" (2001:21). This provides further evidence of the importance of managerial practice and the role of MM.

The trend towards brand affiliation in services is a natural response to intangibility and geographic expansion (Roper 2018) and in hotels means that brand standards become paramount. Hodari and Struman (2014) acknowledges that brand affiliation potentially leads to lower autonomy for managers as there is stricter imposition of brand standards (to maintain brand integrity) and more proactive regional marketing and sales strategies. The combination of brand affiliation, complex stakeholder relations provides the arena for dialectical tensions, in fact Seal and Mattimoe (2014) acknowledge that tensions arise, or rather are orchestrated, to creatively enhance organisational and strategic control. In their study of three hospitality organisations (including a budget hotel company) they found tensions "develop out of conflicts between different goals and logics" from the various functional areas, including Revenue Management and finance, and between unit and head office (Seal and Mattimoe 2014:230). These tensions are often mediated by GMs, they have to walk the line between profit maximisation, brand standards and customer relationship management. According to Seal and Mattimoe (2014) this dialectical management model<sup>9</sup> is fundamental to the effectiveness of the organisation and the

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<sup>9</sup> Based on a Socratic dialectic where "conflicts take place within a co-operative atmosphere" (Seal and Mattimoe 2014:234).

delivery of emergent strategies and is a constituent of “the hectic and many-faceted roles of a general manager” (2014:238). In addition to the effects of brand affiliation on governance and control, the hotel industry exhibits added complexity due to a business model that separates operation and ownership, known as the asset light strategy.

The hotel industry has experienced significant growth and change (Litteljohn, Roper and Altinay 2007; Roper 2018), for most companies this growth has been achieved, through ‘asset-light’ strategic initiatives including franchising and management contracts (Denton, Raleigh and Singh 2009). This business model that has resulted in “unique ownership-management structure[s]” (Roper and Hodari 2015:1). These governance and operational structures result in hotel GMs having to deal with a complex range of stakeholders (Mongiello and Harris 2006). Xiao, O'Neill and Mattilla (2012) acknowledged the role of hotel owners in strategy and their influence on operating performance. In addition, Singh et al (2012) recognised the importance of the evolution of the professional role of asset managers. Collectively, these studies are testament to the changing and complex range of stakeholders with whom Hotel GMs interact and which impacts upon the network of relations and the structures of signification embedded in the position practices within the strategic context.

Thus far the literature has painted an unequivocal picture of complexity and degrees of uncertainty resulting from structural features in the industry and the nature of service characteristics. The strategic environment is also enriched by sociocultural facets that make hospitality, and hotels in particular, imitable. The hospitality industry is recognized for cultural practices (Ahrens and Chapman 2002), ritual behaviours and acknowledged resistance (Mars and Nicod 1984; Peacock and Kubler 2001). Hospitality firms also display strong service cultures (Houghton and Tremblay 1994; Korczynski 2002) and much has been written about the notion of Hospitableness, which is an important facet of the sociocultural milieu. According to Telfer (2001) hospitableness can be viewed as a trait, the “reason why people choose to pursue a trait of hospitableness is that they are attracted by an *ideal* of hospitality, founded on a sense of the emotional importance of the home” [Emphasis in original] (Telfer 2001:53). Such values and traits form part of the organisational culture, the topic of culture and organisational culture will be addressed in the following chapter, but for now, it is useful to reflect that these structural and cultural

features coalesce to accentuate the role of MM in service organisations and in hotels in particular.

In a constructionist study such as this, it is important to understand the context for action, and thus review the extant knowledge relating to the hotel industry. This has revealed how business models and industry developments construct complexity in micro practices of GMs. Their role as key strategic agents is amplified by the competitive dynamics and the impacts of organisational features on strategy implementation and control. These facets of the industry make an acknowledgement of culture important and a focus on control relevant. In addition, there is a need for more research, this review reveals that research in hospitality context adopts a functionalist and managerial orientation (Morey and Dittman 2003) and would benefit from deeper theorising and more qualitative approaches (Lugosi Lynch and Morrison 2009). Also, it is noted that generally existing research sits at the apex of the firm with an organisational focus (Turner and Guilding 2010; Krahkmal 2006) so there is value in adopting a micro-practice perspective to focus on Hotel General Managers, and an opportunity to contribute to knowledge.

### 2.5.2 Hotels General Managers, role and profile.

A review of applied literature focussing on hotel general managers is necessary at this stage to identify what is already known about the role, competences and behaviours of Hotel GMs. Such a review of extant literature will also reveal the dominant paradigms and which theories and concepts have been utilized and debated in this body of work (Flick 2014). Like most hospitality management research, the extant literature relating to hotel GMs is predominantly functionally orientated, deterministic, mainly positivistic, with a strong US orientation (Botterill 200; Atkinson and Jones 2008). Much survey based empirical work attempts to develop normative theories to explain observed phenomena leading to prescriptions geared to the “industry prerogative” (Botterill 2001:192). Often described as uncritical (Ladkin 1999a) the absence of theoretically grounded research in Hospitality has been hotly debated (Nailon 1982; Jones 2004; Wood 1983). Although later initiatives to promote more mature pluralist research philosophies, particularly Lashley and Morrison (2001) and Lynch et al (2011) have widened the gaze of researchers (e.g. Morrison and O’Gorman 2008). One isolated example of such a study is Giousmpasoglou

(2019) who drew upon “rich data to situate localised experiences from social actors themselves (2019:403). These findings provided insight into the characteristics and circumstances that provide the context for GM work in relation to strategic planning but did not expose the agency itself. Despite this emancipation, the majority of the published work relating to GMs remains functional and instrumental with an institutional or macro perspective. This is one of the reasons that this study takes a more subjectivist and agentic approach to fill a gap in knowledge. Despite the lack of philosophical alignment to this study, a brief review of this literature is necessary to provide contextual grounding (Flick 2014).

A recurrent theme in the literature is that hospitality is different and unique (Altin et al 2018). The role of a hotel GM is also widely recognised as distinctive and important in the hotel business, a complex and pivotal role (Bharwani and Talib 2017). Hotel general managers are seen as “the key implementer of the business strategy for the property” (Eder and Umbreit, 1989, p.27), Woods et al, claim that “no other single position has greater effect on the success of a hotel property” (1998:38) and they remain so, even in the face of changes in the structure and governance (Hodari & Sturman (2014). Roper (2018) reports the importance for hotels chains to establish “a cadre of managerial talent” (2019:67) describing GMs as ‘rainmakers’<sup>10</sup>. Research has also identified the hotel GM role as a ‘target job’ (Ladkin 1999 :167) in the hotel industry with a long socialisation process (Dann 1991). Ladkin’s 1999 review of research on hotel general managers argued that hotel management is recognised as different to general management. There is the need to understand management roles and experiences from an occupational perspective (Guerrier 1987; Gebbels, Pantelidis and Goss-Turner 2019). Occupations form societies and cultures (Houghton and Tremblay 1994) within which people live their lives and make day to day decisions. Hotel GMs will be distinctive from other general managers’ because of the occupational context. The unique context Hotel GM’s inhabit affects the nature of their role and characteristics and their professional career pathways (Gebbels, Pantelidis and Goss-Turner 2019; Ladkin 2002; Mulvaney et al 2007). This emphasis on occupation,

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<sup>10</sup> Rainmaker is a term used to characterise critical employees, nurtured through HRM strategy, who have a central role in building revenues and contracts in professional service setting (Boxall and Steeneveld 1999)

highlights the need to understand position practices<sup>11</sup> (Giddens 1984; Stones 2005), which are deeply rooted expectations about behaviour associated with key roles in society.

Ladkin (1999) completed a review of research into Hotel GMs and found several prominent themes. Published research addressed what they do (managerial work), how their careers develop, who they are (personality characteristics) and what competences they have and need. More recently, Bharwani and Talib (2017) reviewed competency and leadership literature to identify a typology of Cognitive, Functional, Social and Meta competencies developing a competency framework of 43 items for hotel general managers. There is a degree of consensus that the role of the hotel GM has been changing (Birdir 2002; Harper, Brown and Irvine 2005; Woods et al 1998). This is driven by the shift to an asset-light strategy (Denton, Raleigh and Singh 2009; Gannon, Roper and Doherty 2010; Roper 2018; Roper and Hodari 2015). the impact socio-technological developments (Altin 2017; Ladkin 1999) on sales and distribution particularly (Altin 2017; Oskam and Zandberg 2016), and IT (Law and Jogoratnam 2005). Bharwani and Talib observe that the GM role ‘has transitioned from operational to strategic leadership’ (2017:409) which makes this study of strategic agency both pertinent and useful in the contemporary context of hotel management.

When considering the role of the hotel GM, many researchers draw upon Mintzberg, for example, Shortt (1989), Nebel III and Ghei (1993) and Bharwani and Talib (2017). Shortt’s (1989) rather descriptive research found differential application of the 10 roles and called for more research. Nebel III and Ghei (1993) recognised temporal differences, in the short run, GMs focussed on operational control demonstrating Mintzberg’s Monitor disseminator role, Disturbance handler and Resource allocator. In the medium-term GMs function was identified as ‘Organisational Developer’ and in the long run, GMs became a ‘Business Maintainer’, focusing on capital investment and stabilising the business. They concluded that successful hotel managers must be effective in several of Mintzberg’s roles (Nebel III and Ghei 1993:37). As in generic research the roles played by middle managers have remained fairly stable overtime. However, there is a shift towards stronger business orientation (Harper et al 2005) especially in multi-unit settings (Goss-Turner and Jones 2000) such that Mongiello and Harris propose that GMs should be ‘quasi-entrepreneurs

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<sup>11</sup> Position practices will be discussed later in Chapter 3

(2006:376). Emerging role of technology (Ladkin 1999) is changing the nature of managerial work in hotels too, this is leading to institutional responses particularly in area of Revenue Management (Abrate and Viglia 2016; Altin 2017).

Roper et al (2001) and Dann (1991) acknowledge that managerial work is fashioned by extended socialisation processes that lead to similarities in the way GMs carry out their work, despite the “large areas of discretion in their work” (Ladkin 1999:170). Dann also asserts the importance of culture and philosophy of the organisation and the influence of strategy leading to four key roles; Entrepreneur, Cost controller, Marketer, and Service orientated (Dann 1991). The legacy of a strong operational emphasis is reflected in the skills and attributes observed in GMs built up typically over a 10-year process (Roper Roper et al 2001). The root to this ‘target job’ (Ladkin 1999:167) is often through food and beverage operations identified as ‘salient’ job in GM careers paths. This corroborates Nebel, Lee and Vidakovic (1995) findings with 44.6 % of GM progressing through F&B root, with front office being the second most significant department in terms of years served; this study revealed the importance of spending time in operational departments and observed an increasing trend for this with younger GMs, who have more operational experience than older GMs (Nebel Lee and Vidakovic 1995). These craft skills and operational knowledge underpin a style of “visible management activity” (Ladkin 1999:168). This trend however may be changing, with an increased business orientation (Gannon, Roper and Doherty 2010; Guerrier and Lockwood 1990 in Ladkin 1999) evidence is emerging that a “move towards a more business perspective in the role of hotel general manager may in fact be influencing the development of managers’ careers” (Harper, Brown and Irvine 2005:51).

The issues of work life balance and mobility recur in the literature, Sarabakhsh, Carson, and Lindgren (1989) found that careers in Hospitality interfered with managers’ personal and social life more than in other sectors and found greater levels of stress. The other key factor in GM career profiles is the mobility, Ladkin argues that the emphasis on mobility “helps to define the character of the industry” (1999:173). This need for mobility maybe a factor in habiting women’s careers. One underlying theme in the literature signposted by Ladkin (1999) is the lack of female GMs (Mia & Patiar 2001; Woods & Viehland 2000), this gender imbalance has persisted over many decades (Brownell 1992; Nebel et al 1995) and is widely noted in the literature (Brownell 1992; Brownell 1994; Ghei and Nebel 1994;

Woods and Viehland 2000). Although there is some evidence of slight improvement it remains an issue (Okumus et al 2016; Tavitiyaman, Weerakit and Ryan 2012). While gender issues are extremely important, they are not the focus of the research, however is interesting to note that the empirical sample in this study reflects the gender bias reported in the industry.

Change and autonomy were key themes in the extant research. Bharwani and Talib (2017) argue that globalisation and the intensification of competition accompanied by “the emergence of experience-seeking, tech-savvy” customers have generated “new job demands and professional challenges for the hotel general manager” (2017:409). Hodari and Struman (2014) acknowledged the changing nature of the hotel industry and its impact on GMs’ roles and autonomy, they argued that increasing use of management contracts and the centralisation resulting from large chain operations, has led to a decrease in autonomy. Mongiello and Harris (2006) also noted this tension between centralisation and autonomy and the need to find a balance. Hodari and Sturman’s (2014) quantitative study considered autonomy in relation to ownership structures (chain versus independent), education and experience, they concluded that “independent GMs have more autonomy than chain GMs” (Hodari and Sturman 2014:433) and that chain operators gave more autonomy to GMs who had greater experience and more formal education. Elbanna (2016) looked at the relationship between autonomy, organisational politics in the strategic planning processes. However, these somewhat reductionist studies leave many questions unanswered, such as, are there structural barriers to autonomy or is autonomy a function of the discursive practices of GMs and their own exertion of agency. This study aims to shed a light on GMs practices with explicit recognition of structural and agentic factors. A study of day to day practice, such as in thesis, could potentially reveal this detail and provide more explanation of the micro processes in play.

It has been shown that a hotel GM is a unique and critical role, likened to a ship’s captain (Jayawardena 2000), who is responsible for the conduct a complex multi-business operation. Many studies have applied psychological theories to understand the personality traits and characteristics of GMs (this was a key theme of extant research identified by Ladkin 1999). Drawing on a range of studies, Mullins and Davies (1991) found that compared to other managers GMs are more assertive, active, calm, competitive, cynical, enthusiastic, independent, socially bold, spontaneous, stable and stubborn. In addition,

they found GMs were “harder to fool, more deliberate and concerned with self” (Mullins and Davies 1991:22). Brownell (1994) identified GMs demonstrated integrity, hard work, determination and interpersonal skills, earlier, noting the need for ‘people skills’, highly developed interpersonal and communication skills, not least because ‘social interactions are part of the product itself’ (Brownell 1992:113). Roper et al (2001) noted a self-reliant spirit, with GMs being deliberately exposed to difficult situations, almost a sink or swim approach, “in the hope they would not screw-up” (Roper et al 2001:22). Jayawardena (2000) identified the qualities of successful international hotel managers as adaptability and sociability plus ambition and leadership qualities; D’Annunzio-Green 2002 concurs focusing on the need for cultural sophistication. These latter qualities are related to the international nature of the industry and the need for mobility (Garavan et al 2006; Ladkin 2002). This cumulative inquiry shows GMs as accomplished organisational agents and a valid target to research, embodying a critical and unique role.

The applied hospitality research reveals the nature and characteristics of hotel industry, identifying its unique and industry-centric features, contextualising the role and the changing demands on GMs, to provide background for this research. Because there is a dominance of survey methods and hypothetical-deductive studies, there is apt space for a theoretically grounded constructionist study to complement existing functionalist-dominated field.

### **2.6 Summary and conclusion**

The link between strategy implementation and management control has been firmly acknowledged to assert that strategy implementation and control is a situated social process, that can benefit from a practice perspective. The reconceptualisation of ‘strategy as practice’ (SaP) facilitates the exploration of the research question in this study and the analytical separation of praxis, practitioners and practices can help achieve clarity in the research process. The review of SaP literature revealed the importance of the middle managers as key agents in strategy implementation and the role of social theory in research. The agency reported in the existing studies included sensemaking, boundary spanning and revealed the sophisticated communication practices of MMs. Despite these existing studies, there remains a call for “more analysis of agency as placed within a web of social and discursive practices (Vaara and Whittington 201:324), this research addresses that lacunae.

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The transdisciplinary approach has drawn the researcher to explore a range of disciplines and normative theories relating to middle managers and hotel general managers in particular, showing that middle managers remain crucial in organisational change and that the role of MM is enduring. Whilst acknowledging the importance of middle manager's strategic behaviour and mediating activity, how they engage in strategic agency remains unclear, particularly how they draw on capabilities and resources to implement strategy. The context of a fast-changing organisational environment typified by an international hotel company, was exposed and acknowledged as complex, with multiple stakeholders which requires significant mediating activity by GMs. Applied research relating to hotel GMs is predominantly functionalist and descriptive and the importance of the role and the pace of change validates the need for further research. In summary, there is still a need to explore the micro-agency of middle managers in strategy implementation and that there is an opportunity for much needed theoretically grounded critical research in hospitality management. The next chapter will continue to explore the literature relating to structure, culture and agency, to ultimately present and justify the theoretical framework utilised in this study.

## **Chapter 3 - Culture, Structure and Agency**

### **3.1 Introduction**

This chapter achieves on the second objective by exploring culture and organisational culture to establish the key concepts and constructs that facilitate an understanding of culture and its structuring properties. Thereby establishing that culture has the propensity to both enable and constrain the agency of managers. Structuration theory will be explained illuminating the debates and dichotomies associated with structure and agency, in particular Giddens' structuration theory (ST) and its development into Strong Structuration Theory (SST). In doing so, the foundation for the theoretical framework utilised in this study will be elaborated. Exploring the notion of culture alongside ST will demonstrate how culture can be integrated into SST to provide an empirically useful tool for understanding the agency of middle managers in the practice of strategy implementation. By combining culture and SST extends this framework to create an original approach designed to address the research question at hand. This culturally augmented version of Stones' SST will be presented and theorised to provide a theoretical framework and research tool for this study.

### **3.2 Culture Structure and Agency**

#### **3.2.1 Understanding Culture**

Culture is every day, ubiquitous, common place and complex, it has multiple meanings and manifestations. Society "runs on the basis of and requires culture", thus understanding culture is critical to understanding everyday life (Inglis 2005:4). Alvesson (2002) recognises that culture is difficult to understand and it is widely agreed that to study culture one must first define or theorise culture (Archer 1985; Geertz 1973; Lewis 2002; Wright 1994). Ironically this theorising itself is imbued with a culture comprised of socialised notions and ways of thinking that emerge from the theorists' personal, discipline and social backgrounds (Comaroff & Comaroff 1992). Our own culture as researchers affects our understanding and conceptualisation of culture, a review of culture, by necessity, will reflect various disciplinary worldviews which will be made explicit from time to time, as will the positionality of this researcher in due course.

Inglis (2005) acknowledges the different and often incompatible definitions of culture, noting that Kroeber and Kluckhohn (1963[1952]) found 164 definitions or uses of the word culture. However, this study is not concerned with debating culture as a classificatory system, culture as capital or deconstructing specific aspects of material or visual culture (Lewis 2002). The focus is rather, culture as manifested in human interaction, put succinctly, the “whole way of life of a given group of people” (Inglis 2005:7). Inglis acknowledges the complexity and confusion associated with culture and draws on Williams (1976) to identify eight key facets of culture. Aligned with Geertz, “[C]ulture comprises the patterns of ideas, values and beliefs common to a particular group of people, their characteristic ways of thinking and feeling” (Inglis 2005:7). These groups are differentiated and have their ‘own’ culture, which, contains meanings and is meaningful. In addition, culture is implicated profoundly in the motivation to act in particular ways and is embodied in symbols and artefacts. In consort with most scholars, Inglis acknowledges that culture is learned, arbitrary and is interwoven with forms of social power (Inglis 2005:10). Geertz emphasises the semiotic nature of culture, which is an “assemblage of meanings and meaning making processes” (Lewis 2002: 39) which is both a product and process of human existence.

Culture is experienced through the senses and then given meaning through the individuals reflexive or pre-reflexive processes that draw on ‘stocks of knowledge’ (Berger and Luckman 1966; Sayer 1992) laid down over time and constantly adapted or reaffirmed through experience. Cultural patterns and stocks of knowledge are made up of “common routines, customs, habitualised behaviours, which when reciprocated become institutionalised” (Berger and Luckman 1966:71). Thus, culture is implicated in all social relations as explained by Geertz, “[C]ulture is the fabric of meaning in terms of which human beings interpret their experience and guide their action; social structure is the form that action takes, the actually existing network of social relations” (1973:145). This process of meaning making occurs and evolves in the day-to-day practices of people, thus it is important to acknowledge the relevance and importance of a practice perspective (Reckwitz 2002; Whittington 2006). It is through this process of action and interaction that culture is maintained or changed.

It should be recognised that culture is not static (Wright 1994). Lewis (2012) highlights the transitional and unstable nature of these culturally determined patterns of behaviour, especially in the postmodern world of globalised communication and awareness. In a similar vein, Archer (2012) emphasises the pliable and malleable nature of culture powered by the reflexivity of agents. This is relevant in understanding organisational culture in the context of strategy implementation, which is normally associated with change and transformation. Geertz conceptualises culture as a control mechanism, he states that culture is better understood not as a set of complex behaviours, but “as a set of control mechanisms - plans, recipes, rules, instructions” that govern behaviour (Geertz 1973:44) without which, humans would become overwhelmed by the complexity of life. The cultural patterns and stocks of knowledge help people cope, hence in everyday interactions people don't have to think everything through from scratch, every time. This reduces anxiety and maintains ontological security which facilitates human thought and innovation. Taking this view means that culture can be conceptualised as a source of security and a protective device.

Giddens discusses the notion of ontological security (OS), which he describes as “confidence or trust that the natural and social worlds are as they appear” (Giddens 1984:375). For Giddens, in the context of modernity the unrelenting change challenges peoples' sense of security (Giddens 1990). This macro concept can be implicated in the micro actions of middle managers implementing strategies. The need to sustain OS is a powerful and often unconscious motivation for human action (Cohen 2008) especially when applied to “the continuity of their self-identity” as well as social and physical environments (Giddens 1990:92). As has been discussed, new business strategies can shake the old order, require new practices (Rouleau and Balogun 2011; Tavikoli and Perks 2001) and new roles (Brubakk and Wilkinson (1996a), thus changing the social order of everyday life. Ouchi and Wilkins (1985), acknowledge Schein's view that “culture represents the ways people have learned to cope with anxiety. Thus, attempts to change culture are tantamount to asking people to give up their social defenses” (Ouchi and Wilkins 1985:477).

Culture is complex and contextual, local and yet arguably universal. Geertz (1973: 38) questions the idea of “consensus gentium”, the notion that there are some things that all people can “agree upon as right, real, just or attractive and that these things are, therefore,

things in fact right, real, just or attractive” (1973:38/39). Many theorists recognise that cultures form and develop at many levels and within a variety of sub groups. Lewis (2002) acknowledges this variety, listing a range of manifestations, including family culture, work culture, religious culture, a national or ethnic culture. Thus, occupations can have cultures (Palmer, Cooper and Burns 2010) and there can be subcultures within these (Paoline 2004) each ‘culture’ has a system of meanings, these assemblages of meaning are ‘cultural patterns - organised patterns of significant symbols” (Geertz1973:46). The recognition and implications of subcultures will be addressed again in the context of organisational culture in section 3.3.1. Acknowledging the debate about the level of cultural consistency, it can be argued that these cultural patterns are embodied in agents/actors in the notion of ‘Position Practices’<sup>1</sup> (Cohen 1989; Stones 2005), i.e. ways of being, doing and seeing, which is an important construct in understanding how managers implement strategy

To facilitate a study of the micro practices of middle managers, within a broader cultural context, it is necessary to bridge the macro and the micro conceptualisations of culture. Hays (1994) draws on Berger and Luckmann, Geertz, Durkheim and others to identify two key elements of culture, “systems of social relations and systems of meaning” (Hays 1994:65). Social relations occur within a specific context, Inglis likens people to “fish swimming in their own cultural waters” (2005:39), taking for granted and accepting as natural the cultural forces that impact their everyday lives. Thus, systems of meaning and social relations are bound up together in a self-sustaining sociocultural milieu, therefore, the next section considers a sociological view of culture and addresses the classic dichotomy in sociology between agency and structure, which is fundamental to this structuration study.

### 3.2.2 Culture, Agency and Structure

As this is a structuration study, it is important to take a sociological perspective; not only to understand culture, but to understand it in the context of the traditional dichotomy of structure and agency. Hays (1994) addresses the classical dichotomies of social sciences in an endeavour to reconcile notions of culture, agency and structure. In this regard Archer’s presentation of culture is interesting, she acknowledges culture as a significantly

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<sup>1</sup> Position Practices will be discussed later in this chapter.

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under developed concept in sociology, recognising its descriptive and explanatory capacities and frailties, she characterises culture as “the poor relation of structure” (1989:1). Archer depicts the extreme conceptualisations of culture, stating that culture oscillates from being “superordinate power in society.... to... a position of supine dependence on other social institutions”; observing that “culture swings from being a prime mover .... to a mere epiphenomenon” (Archer 1989:1).

This lack of consistency may reflect the unbounded and omniscient nature of culture recognised by Fornäs Fredriksson & Johannisson (2009a) who state in their editorial, that “culture is increasingly positioned as a key force or core element, whether in management or sustainable development discourses, debates on European integration or media trends” (2009b:7). Seeking clarity, Archer (1985) states that in the matter of culture there must be clear distinction between “what culture is and what culture does” (1985:333). Criticising anthropologist such as Malinowski and Benedict, she warns against elision by conflating meaning and community, her solution is to maintain analytical dualism. Despite this polemic stance, her theorising continued to acknowledge the interplay between structure culture and agency, which according to Herepath “is captured through strategists’ perceptions of their ‘social context and personal concerns” (Archer, 2012, p. 7)” (Herepath 2014:2). This study responds to this thesis by utilising SST to employ a practical form of methodological bracketing.

Hays addresses ‘the sticky problem of culture’ in sociology (1994:57), she acknowledges that culture is often bound up with the division and debates in sociological thinking where structure and agency are polarised on a range of dimensions and the interconnectivity between them is lost (or as Archer would claim conflated). Common lines of dichotomy include: -

Table 3.1 Polarised perspectives of structure and agency

| <b>Structure</b>      | <b>Agency</b>      |
|-----------------------|--------------------|
| Systematic, Patterned | Contingent, Random |
| Constraint, Static    | Freedom. Active    |
| Collective            | Individual         |

(Adapted from Hays 1994:57)

In the same way culture is itself juxtaposed with social structure implying that “culture is not structured” (Hays 1994:58) resulting in further opposition in definition which is not helpful to the understanding of culture, namely: -

Table 3.2 Culture juxtaposed.

| Culture  | Social Structure  |
|--|---|
| Subjective and ideal, Soft, Internal, Hidden, Requiring interpretation | Objective and material, Hard, External, Publicly accessible, Open to scientific observation |

(Adapted from Hays 1994:58)

Culture, Hays continues, is often conflated with agency and categorised in opposition to structure, she argues that researchers should conceptualise culture as part of social structures which are “cognitive and normative systems that are at once material and ideal, objective and subjective, embodied in artefacts and embedded in behaviour, passed about in interaction, internalized in personalities and externalized in institutions” (Hays 1994:65). Whilst acknowledging that culture is a social structure, it should be remembered that culture is pliable and as Archer acknowledges, actor’s reflexivity and ability to exert power within and thus upon structures. (Herepath 2014). This study will address these debates and walk the line between polarised views of culture to understand how culture is implicated as structure and in agency. In this study, culture will be drawn into a model of agency, through the adaptation of Stones’ Strong Structuration theory (explained later) showing how culture is both a resource for and a constraint on action.

The various bipolar debates in sociology can be muted by drawing on the integrative theory of structuration to bridge the polarised views, this study utilises Stones’ Strong Structuration Theory (SST). SST can provide a solution to these dichotomous dilemmas to find a middle ground, walking the line between conflation (i.e. combining together such that the elements are obscured) or giving primacy to either domain.

### 3.3 Organisational Culture

The problems that beset a definition of culture do not diminish when addressing organisational culture. As the contextual setting for this study is inside a commercial organisation it is important to understand, how culture in organisations is conceived in the extant literature.

### 3.3.1 Understanding Organisational Culture

“Established as a dominant concept in organisational theory” (Harris and Ogbonna 2002:32), organisational culture is an elusive concept, characterised by pluralist theorising (Wright 1994). Many scholars see culture as a deep system of meaning, which underlays surface interaction (Morgan 1986:133) argues, “the slogans, evocative language, symbols, stories, myths, ceremonies, rituals, and patterns of ritual behaviour that decorate the surfaces of organisational life really give clues to the existence of a much deeper and all-pervasive system of meaning”. Schein (1990) is recognised by many as one of the seminal authors in this field because he draws heavily on anthropological notions and pragmatically packages culture for a management and organisational context and audience. Schein recognises the concept of organisational culture as ambiguous, due to the definition of a group or sub group, in addition it is challenging to uncover evidence to reveal the culture of a given group and the transient, contextual or temporal nature of cultures. Schein defines culture as,

(a) a pattern of basic assumptions, (b) invented, discovered or developed by a given group, (c) as it learns to cope with its problems of external adaptation and internal integration, (d) that has worked well enough to be considered valid and, therefore (e) is to be taught to new members as the (f) correct way to perceive think and feel in relation to those problems. (Schein 1990:111)

This definition of organisational culture emphasises the process of culture creation and the manner in which it is sustained.

Wright (1994) traces the development of anthropology in organisations and organisational studies acknowledging that ‘culture has acquired multifarious meanings’ (Wright 1994:17). Arguing that culture resides in informal as well as formal systems, she reflects on Morgan’s metaphor of ‘organisation as culture’ which challenges the very notion of organisations and asserts that “even the most material aspects of organisations are only made real by being given meaning” in a continual process (Wright 1994:19). Smircich (1983) also argues that culture is a process, asserting that when culture is a root metaphor, theorists can reconceptualise organisations and “leave behind the view that culture is something an organization *has*, in favour of the view that a culture is something an organization *is* “[emphasis in original] (Smircich 1983:347). Such a view means that culture cannot be reduced to list of attributes and challenges the view that it can be managed, as some believe (Deal and Kennedy 1999; Peters and Waterman 1982).

Alavi, Kayworth and Leidner (2006), acknowledge the debate between cultural theorists, regarding whether or not an organisation can have a uniform set of values or whether local cultures exist. Respectively, integrationists (such as Schein 1990 and Martin 1992) believe that homogeneous values exist that glue diverse organisational members together; differentiationists (such as Smircich 1983 and Van Mannen & Barley 1985) observe multiple subcultures with their own distinctive values<sup>2</sup> (Martin 1991:353). Meyerson & Martin (1987) recognised the apparent contradiction that organisational cultures are constantly in flux, gradually adaptive and yet resistant to change, arguing this contradictory coexistence results from the subjectivity of culture. They acknowledge three different paradigmatic views of culture, one characterised by consensus and consistency, and the strong role of leaders. The second acknowledging dissent and difference resulting in diverse culture with “overlapping and layered subcultures” (Meyerson and Martin 1987:630), thirdly, culture is ambiguous, transient and individualistic. Notably they argue that all three can coexist and it is necessary to accept multiple realities within the complex dynamics of culture (Martin 2002). In a multi-unit service organisation, it is likely that diverse and localised cultures will exist.

Joanne Martin identifies two key different conceptualisations of culture; as a metaphor and as a variable (2002:4). In particular Martin characterises culture in organisations “as a vortex’ (2002:5) acknowledging cultural studies is attracting many different theorists from different traditions, who also bring their controversies with them. Alvesson (2002) applies considerable conceptual effort to understand culture as a metaphor, he acknowledges Morgan’s early use of metaphor to understand organisations but cautions against the vague generalities that can emerge. He considers eight metaphors drawn to offer a spectrum of ways to think about culture. These include, culture as ‘exchange-regulator’; culture as a control mechanism based on moral contract; ‘compass’; ‘social glue’; ‘sacred cow’; ‘blinders’ and ‘world closure’ (Alvesson 2002 pp31-36). In this study the role of culture is implicated in the agency of middle managers, thus some of these metaphors may be relevant.

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<sup>2</sup> For an extensive list of single perspective cultural studies see Martin’s list of integration, differentiation and fragmentation perspective studies (Martin 2002:100-101)

Schein (2004) discusses the value and limitations of typologies, stating their utility lies in their ability to provide structuring conceptual categories in a complex world. However, the weakness comes from their abstract nature and, sometimes ineffective or inappropriate generalising quality, they cannot help us understand the particular. Despite emphasising this caution, Schein (2004) devotes a chapter to presenting a variety of organisational cultural typologies. Etzioni (1975) used power to describe organisational types as Coercive, Utilitarian and Normative. Goffee and Jones (1998) compare solidarity and sociability in cultures to identify, Fragmented, Mercenary, Communal and Networked organisational cultures. Hofstede's study of national cultures in IBM, was both influential (Pugh & Hickson 1993) and contentious (Baskerville 2003; Harrison & McKinnon 1999); proposed six dimensions of national cultures resulting in shared attitudes and values associated with nation states (Hofstede 2001). An interesting finding from this study is that despite sharing national culture, differing practices were observed within this global organisation, by people ostensibly sharing the same culture. This finding supports the view that organisational practices "are learned through socialisation at the workplace" (Hofstede et al 1990:312). As a note of caution, Fang (2005) warns against bipolar analysis in some frameworks and Schein argues that most such frameworks are neither empirically proven nor diagnostically valid and warns that they encourage "a bias towards what Martin (2002) calls the integration perspective" (Schein 2004:200) as such, they are not employed in this study.

The notion of levels of culture is arguably a tautological concept, Geertz (1973) and Inglis (2005) acknowledge subcultures exist but there are different conceptions of levels of culture amongst theorists. For organisational theorists, culture occurs at different levels within the organisations (Lewis 2002; Schein 2004; Martin 1992; Alvesson 2002) and for cultural theorists, culture is manifest within individual human beings at different levels of cognition as espoused values or pre-reflexively as unconscious habits or expectations (Archer 1989; Hays 1994; Inglis 2005). The extent to which culture is observable and what can constitute a suitable indicator or proxy for culture is a moot point and will be addressed shortly when considering how to study culture. For now, acknowledging the stratified nature of culture (discussed earlier) it is useful to explore the notion of subcultures in organisations.

Accepting the argument for subcultures, it is inevitable that occupational cultures must also exist. Schein argues that where an “occupation involves an intense period of education” and there is “shared learning of attitudes, norms and values” (Schein 2004:20), it is reasonable to assume that such cultural forms (ways of going on) may persist over time. Palmer, Cooper and Burns (2010) acknowledged shared values, language and working practices that made Chefs distinct and engendered a sense of belonging in a shared identity. Paoline (2004) built on the work of Van Meenan (1974) and others, utilising survey data to identify seven analytically distinct subcultures within the “monolithic” police culture, also noting different levels of culture (Paoline 2003). Many occupations or professions share values norms and standards of behaviour, many in the same industry also share values and attitudes, earlier research reveal common traits amongst hotel GMs (Ghei and Nebel 1994; Mullins and Davies 1991) some have even attempted to construct a Hospitality cultural scale (Dawson, Abbott, and Shoemaker 2011; Rahimi 2017).

It is widely acknowledged that service organisations have specific service culture that has evolved and emanates from the peculiarities, characteristics and challenges of service industries (Brownell 1990; Gronroos 1990; Houghton and Tremblay 1994; Korczynski 2002; Modell 1996; Sharma 2002; Wilcox 2007). We have already seen in the previous chapter that traits of hospitableness (Telfer 2001) are notable in this industry sector. Cultures are often described as strong and customer or market orientated (Brander Brown 2002; Goss-Turner 2010; Harris & Ogbonna 2002). Korczynski (2002) acknowledges the role of and focus on the customer is ‘unique’ to service work. A strong culture implies cultural conformity associated with an integration culture (Martin 1992; Martin 2002). In service industries, a high degree of apparent conformity is achieved through the inculcation of cultural norms by HR processes such as selection and training of the “right sort of people” (Korczynski 2002:3), what Ogbor calls the hegemony of culture (2000). Internal promotions can help to ‘fix’ a culture where as recruiting from outside is often used to promote change (Meyerson and Martin 1987), they can also be sustained through rituals and stories (Alvesson 2002; Geertz 1985; Harris and Ogbonna 2002).

This is not to imply that there is a kind of unquestioned ‘consensus gentium’ (Geertz 1973) at industry level, but more likely a differentiated set of subcultures (Mars and Nicod 1984; Martin 2002; Paoline 2004) driven by professional allegiance, organisational settings and structures (Palmer, Cooper and Burns 2010). Goss-Turner (2010) studied a national pub

chain, focussing on the culture within two distinctive brands, although within a single corporate entity with the same mission and objectives and similar procedures; they displayed very different cultures. He found that the combination of the impact of customers, symbolic and substantive consumption resulting from the complexity of the service encounter and attitudes of employees resulted in a different cultural alignment. This example reveals the multifaceted and differentiated nature of cultures that can exist simultaneously within a single organisation. Geertz (1973) used the metaphor of a kaleidoscope to acknowledge that culture is constructed of multicoloured chips, which although consisting of known facets, can be “formed and re-formed into a variety of different, yet complimentary, structures” (Palmer 1998:369).

A myriad of factors will affect the emergence, coherence, durability or evolution of any culture within an organisational setting. A shared history is a necessary element of culture, intense experiences can result in ‘strong’ culture. The contested notion of strong culture implies coherent values, high degree of shared assumptions and reduced inconsistencies, arguably resulting in improved performance (Deal and Kennedy 2000), but some organisations have little communal history and repeated turnover of members, so culture is weak (Alavi, Kayworth and Leidner 2006; Meyerson and Martin 1987; Schein 2004). The passion and precision of assumptions held by founders or leaders also impacts upon culture (Alvesson 2002; Martin 2002; Schein 2004; Smircich and Morgan 1982), Alvesson states that leaders are implicated in meaning making “influencing the construction of reality – the ideas, beliefs and interpretations of what and how things can and should be done” (Alvesson 2002:114). Ogbor warns against a sugar-coated view of culture and recognises that corporate culture can be “a tool for repression, domination and hegemonic” power (Ogbor 2000:597), which requires researchers and practitioners to be alert to their role in perpetuating cultural hegemony.

Schein amongst other ‘cultural pragmatists’ (Alavi, Kayworth and Leidner 2006) offers recipes for managing organisational culture and yet the debate rages as to whether cultures can be managed, although Alvesson warns against over simplistic recipes typified in the excellence literature of the 1980s typified by Peters and Waterman (1982). Still cultures are both resilient and adaptive, as has already been mentioned, for example, Brubakk and Wilkinson (1996b) studied retail banks and found corporate culture management. In the context of post financial crisis, culture management was facilitated by changing

performance measurement systems, communication and reinforcement by branch managers to create a culture of marketing and sales. Brubakk and Wilkinson (1996b) found branch managers demonstrated personal adaptation “decoding corporate messages” but change was also facilitated by the crisis, which galvanised acceptance of the need for change (Ouchi and Wilkins 1985). Harris and Ogbonna (2002) are sceptical of culture management prescriptions but accept that culture is malleable, although they acknowledge the unintended consequences of culture change programmes and potential for unpredictable outcomes and unexpected consequences. By adopting a structurationist perspective, this study will be sensitised to focus on the actions of middle managers and their consequences to enable these kinds of issues to emerge. This leads neatly into reflecting on the challenges and tactics for studying culture in organisations, which will be discussed in the next section.

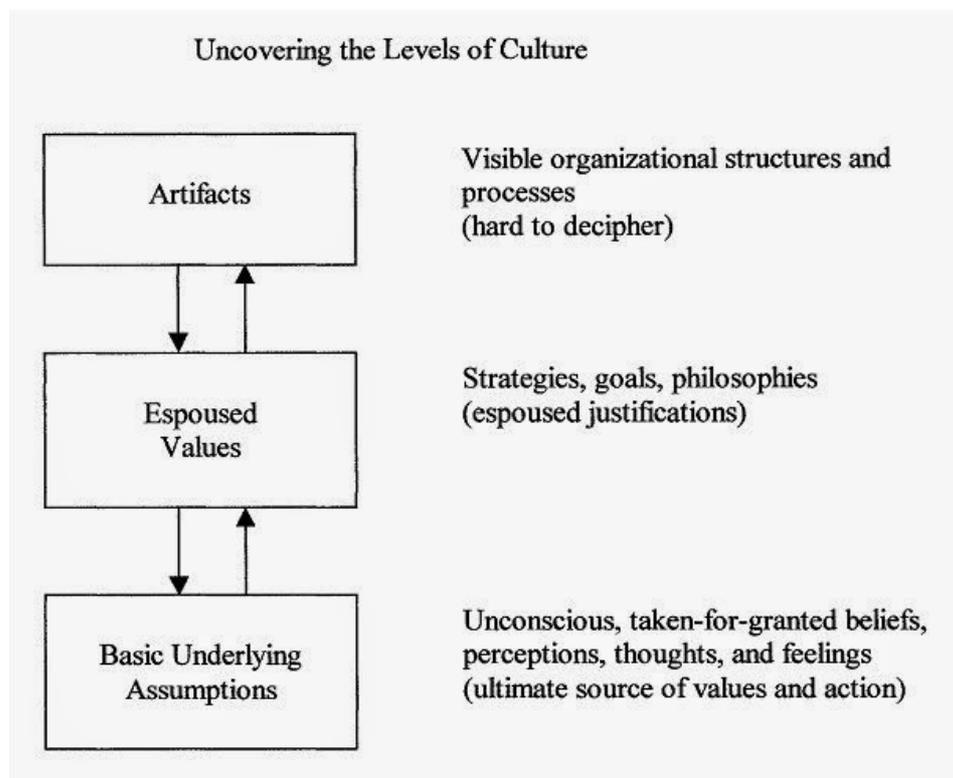
### 3.3.2 Studying Culture

Culture has ontological and epistemological implications for research. Inglis (2005) draws on Berger and Luckman (1966) to acknowledge that human beings do not have a straightforward entrée to reality, “instead it is thoroughly shaped by culture” (Inglis 2005:9). Berger and Luckman (1966) contend that the reality of everyday life is interpreted by men and women, and thus is made real (to them) and meaningful through their own individual subjectivity. If it is accepted that culture is a collection of meanings of a group of people, then by default, it must comprise multiple subjectivities that contribute a collective notion, which is in turn mediated by individual subjectivities. Martin discusses the challenge of striking a balance between etic (outsider) and emic (insider) research, most organisational studies adopt to some extent anthropological approaches to view circumstances from an insider perspective, but this is not easy. The need to “think like a native” (Martin 2002:37) that is to see things from cultural members perspective, is at best difficult, at worst, an illusion. When researchers try to study culture, as Geertz points out “what we call our data are really our own constructions of other people’s constructions of what they and their compatriots are up to” (Geertz 1973:9) Geertz advocates a balance suggesting a modest aspiration between emic and etic vantage points.

Schein (2004) offers an antidote for the enigmatic features of culture, by providing a layered analytical concept of culture. The layers reflect the tangible manifestations of

culture that people can see and feel, down to the deeply obscure and subconscious assumptions that pre-reflexively imbue a person's behaviour. Schein's levels of culture include Artefacts, Espoused Beliefs and Values, and Underlying Assumptions (see figure 3.1). Artefacts can take many forms from architecture and physical layout to language or clothing (dress codes), basic manners and stories or myths, published values ceremonies or rituals. In addition, they encompass organisations processes, documents, such as strategic plans, standard operating practices, charters and organisation charts. These are the most observable aspects of culture, but Schein warns that these are hard to decipher without an understanding of espoused beliefs and values, which provide norms for behaviour and are reflected in organisations' mission and philosophies. The deepest level of culture according to Schein are the basic assumptions, that over time have become embedded and taken for granted, such that agents would not be able to easily articulate or explain them without focussed questioning and self-analysis (Schein 1990).

Figure 3.1 Levels of Culture



Source: Schein 2004:26

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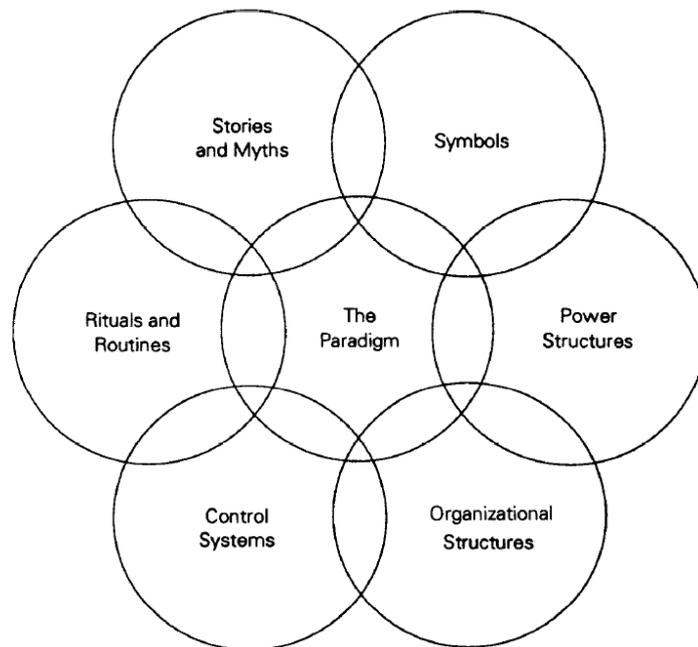
Hofstede also recognises that social systems exist because of (in his words) “human mental programming”, he draws on Bourdieu’s notion of Habitus “a system of permanent transferable tendencies” (Hofstede 2001:4). These values are invisible until made visible through behaviour. Hofstede presents culture as an onion to reflect the visible layers that surround the central core of values, with rituals, Heroes and Symbols being linked by Practices. Symbols include gestures, objects which carry complex meaning, they are most superficial level and can be appropriated by other social groups, lost or replaced over time. Heroes are persons, real or imaginary dead or alive who embody the characteristics valued by a society or group. For Hofstede, rituals are “technically unnecessary, but socially essential” (2001:10) activities that bind individuals to collective norms, e.g. religious ceremonies or business meetings. Together these manifestations are subsumed into practices, which can be observed. Hofstede’s onion reflects levels of culture like Schein’s, but this still does not make culture easily observable. Importantly, whilst acknowledging the risk of oversimplification, Schein suggests that it is possible to decipher assumptions embedded in an organisation’s culture by asking question about external adaptation and internal integration. Adapting to external threats require a shared understanding of core mission, strategy, goals and the means of achieving them, including how these will be measured; internal integration involves achieving group consensus over semantics, boundaries, power and status, norms and friendship, rewards and sanctions (Schein 1990; Schein 2004).

Martin adopts a similar approach to dealing with what she calls “The Esoterica of Cultural Analysis” (2002:65), she identifies a variety of cultural forms including organisational stories, rituals, humour, jargon and physical arrangements such as interior décor, architecture and dress codes as target of study, which can provide hints and traces of what people are believing, thinking and doing in a given cultural context. Johnson (1987) developed the cultural web to visualise how an organisation ‘paradigm’ or ideational culture, was constituted and maintained over time. The cultural web shown in figure 3.2, was later developed to include express acknowledgement of incentives and communication (Heracleous 2003). The concentric circles around the central unobservable cognitive notion of a paradigm, represent the visible aspects of culture, i.e. behaviours and artefacts.

Heracleous notes that the cultural web is versatile, potentially consistent with seeing culture “as a root metaphor for conceptualising organisation within an interpretive frame

of reference” (Heracleous 2003:90). Heraclous utilised the cultural web to map the paradigm in Hays Consultancy in the 1990s as part of an interpretivist study of strategic change, this study will utilise the web as a sensitising device to understand the cultural context and motivation for action of middle managers. Although such frameworks could be viewed as reductionist, or over simplifying, it is important to acknowledge them as a means of facing the challenge highlighted by Alvesson, that due to its ubiquity, culture which can cover everything and thus, ironically, *nothing* (Alvesson 2002). Such frameworks give researchers useful tools to avoid this nihilistic tendency when exploring organisational culture.

Figure 3.2 Cultural Web



Source: Johnson (1987:224; 1992: 31)

Martin (2002) warns that when studying culture (in essence everyday life inside organisations) it is important to consider the scope of the investigation. As Schein states that “culture is ubiquitous” and it is important to differentiate a study of culture versus a study of the whole organisation. Frameworks such as the cultural web provide a useful map upon which to position visible and observable aspects of culture, whilst keeping in mind the risk of reification Crotty (1998). Whatever the epistemological background of the researcher, all theorists acknowledge culture as being created and sustained through human behaviour. Schein (2004:22) describes this process of maintenance; “the group’s

behaviour, and the rules and norms are taught to newcomers in a socialisation process that is itself a reflection of culture”. Consequently, it is argued that culture is both a process (acculturation) and an outcome and is embodied in both structure and agency through a structuration process.

In summary, culture is complexity and ubiquitous nature, fundamentally semiotic in nature (Geertz 1973) can be conceived as a control, or as a protective device, also culture can be seen a process and as well as a product of human interaction and interpretation. It is generally uncontested that culture evolves over time, but there is a tension between a normative view of culture and the acceptance of its emergent, atomistic and temporal nature. Organisational culture has been shown to encompass shared assumptions within a particular group, learnt over time to cope with problems and passed on to new members (Schein 2004). Culture can be characterised as consistent, differentiated or fragmented, and organisations can be seen as an umbrella (Alavi, Kayworth and Leidner 2006) for an assortment of subcultures, which are arguably unique within a strategic context. Culture, can be conceived in opposition to structure (Hays 1994), but also has structural properties. Responding to Herepath’s call to bridge the macro/micro gap, this study will place culture within the arena of strategic practice implicating it in structure and agency, thus will contribute to an understanding of culture and agency in strategy practice.

### **3.4 Agency and Structure – Structuration Theory**

The socially situated praxis of middle managers is at the heart of this research. To address to the dilemmas and dichotomies in social science, the middle range (or integrative) Structuration Theory (ST) will be presented explaining its key constructs and demonstrating its utility in strategy as practice research. Through the critical review of strategic management empirical research that employs structuration theory, it is possible to reveal further insights into key theories conceptualising agency and structure that support this study. Grounded in a critique of the use of structuration theory, an alternative framework will be proposed for use in this study, that of Stones’ Strong Structuration Theory (SST). SST will be explained, and its utility justified in the context of the nascent body of research applying SST published at this time. In conclusion, a summary of the key themes and issues from literature review will support the construction of a new theoretical framework for the study.

### 3.4.1 Agency, Structure and Structuration Theory

The problem of structure and agency has vexed social scientists throughout the 20th century (O’Byrne 2011; Ritzer 2007; Urry 1982), Archer confirms that “(t)he fundamental problem of linking human agency and social structure stalks through the history of sociological theory” (Archer 1982:445) constituting a “central dilemma in social theory” (Archer 1989:ix). Debates over the primacy of structure (in all its many forms, institutions, governments, social hierarchies, and norms) versus agency (the self-determined actions of human beings) have resulted in polarised views. There has been vociferous debate in the past (Archer 1982) between objectivism and subjectivism, voluntarism and determinism (Whittington 1988; Hays 1994; Pozzebon 2004). However, there have been attempts to bridge the macro and micro gap, or structure and agency problem, for example, Bourdieu and Giddens; these integrative theories (Ritzer 2007) provide potentially useful theoretical frameworks for studying strategy implementation and control in organisations (Whittington 1992; Macintosh 1995; Baxter and Chua 2003; Jack and Kholeif 2008; Golsorkhi et al 2011;). These theoretical perspectives recognise that agency and structure are inextricably linked, by recognising that as agents exert their influence by acting within social structures, they can thereby change those social structures, through a constant dialectic of practice and position (Jarzabkowski 2004; Stones 2005; Ahrens and Chapman 2006; Coad and Herbert 2009; Seal and Mattimoe 2014). This process of structuration was famously, but not uncontroversially, explicated by Anthony Giddens, turning structuration into a key gerund in social science.

According to Cohen (1989) Giddens structuration theory “is grounded in common sense” (1989:1) ontologically accepting that,

“all social life is generated in and through social *praxis*; where social is defined to include the nature, conditions, and consequences of historically and spatio-temporally situated activities and interactions produced through the agency of social actors” (Cohen 1989:2 emphasis in original).

As such Giddens is fundamentally a practice theorist<sup>3</sup>, influenced by the work of Goffman and Garfinkle (Cohen 2008), developing middle range theoretical ideas that attempt to

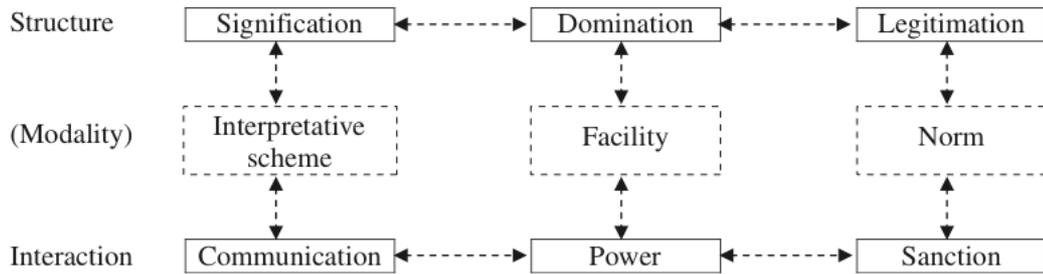
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<sup>3</sup> Giddens is renowned for his reinterpretation of classical sociological theorists and his publication record (Clark 1990:21), but here the focus is on his later theorizing and in particular structuration theory.

reconcile the traditional dichotomies in social science. According to Parker 2006, Giddens attempts a synthesis of the polarised objectivist and subjectivist perspectives, avoiding the extremes of “objectivism (structures without agency - reification) and subjectivism (agency without structure - reduction)” by steering straight down the middle (Parker 2006:123). Thus, Giddens’ structuration theory provides a useful framework for understanding agency in practice; this integrative theory endeavours to escape “the dualism associated with objectivism and subjectivism” (Giddens 1984: xxvii). Giddens (1984) asserts that structure and agency are inextricably linked through his concept of duality of structure, which recognises the interaction and inseparability of structure and agency. Acknowledging the recursive nature of social life, structure is seen as a medium for action “... and an outcome of conduct which it recursively organises” (1984:374). The fundamental notion of duality has consequences for the way people conceptualise structure and agency. Structures, from a structurationist perspective “not only constrain but also enable action” (Sydow 1998:36). Giddens affords power to the agent, insisting that for agents to be agents, they must “be able to act otherwise...to intervene in the world or to refrain from such interventions, with the effect of influencing a specific process or state of affairs” (Giddens 1984:14). These two notions are fundamental to understanding Giddens’ project to propose a duality of structure and action (agency).

Giddens explicates structures acknowledging three dimensions or kinds (Parker 2006) of structure, Legitimation, Signification, and Domination (Figure 3.3), which are often referred to as Rules and Resources. Rules are linked to Legitimation, a normative concept moral in nature, relating to conduct, and Signification in the form of interpretive schemas for understanding and meaning making. Rules in ST are not akin to codified modes of conduct or standard operating practices, they are guides to social praxis that are only manifest in action and perpetuated virtually in memory traces of agents. Giddens also recognises that agents need *Resources* to exercise power. Agents have potential command over *allocative* (objects and material) and *authoritative* (people) resources, where they have the capability through knowledge and motivation, agents can draw on these structures and in so doing perpetuate or change power relations (Giddens 1984; Stones 2005; Parker 2006).

Figure 3.3 Dimensions of the duality of structure.



Source: Giddens 1984:29

Acknowledged as inseparable in practice (Giddens 1984; Jarzabkowski 2008), these structures exist virtually, internalised in the agents' knowledge; they "involve phenomenally inflected 'stocks of knowledge' about the external context and conditions of action." (Stones 2005:17). That is not to say that all structures are virtual, but that agents make sense of the material and social world, drawing upon their own learning and socialisation and through "their hermeneutic mediation" to understand and then take action (Stones 2005:21). Giddens imbues agents with knowledgeability and the ability to act otherwise, it is "this 'structural/hermeneutic core' which justifies retaining Giddens' founding conception of the 'duality of structure' as both 'medium and outcome' of agency" (Parker 2006:126). What actors have learnt and know will determine how they view structures and how they act (Greenhalgh and Stones 2010). Thus, in the context of strategy implementation, managers will draw on their knowledge of the strategic intent, the norms of the organisation and expectations of their role to deliver performance outcomes in the course of their day-to-day actions; as such they will maintain or change those plans and assumptions, importantly this is the conceptual heart of this research. As Whittington neatly said, "(M)anagers, then, can be seen as constantly drawing on past arrangements as they repeat, tinker with, bend or challenge what worked for them before." (Whittington 2011b:113).

Giddens acknowledges the 'dialectic of control' a notion that recognises that relations of dependence and autonomy integral to the social world are not grounded solely in coercion, but that there is a two-way quality to power. He claims that "the less powerful manage resources in a such a way as to exert control over the more powerful in established power relationships" (Giddens 1984:374). Thus, Giddens recognised the plurality of power within social settings. Giddens also emphasised the role of 'ontological security', that is the

unconscious need to generate feelings of trust and security, citing Garfinkel's experiments on rule breaking, he claims that ontological security is the key motivation for action. In addition, referring to Goffman's term 'protective devices' agents "sustain the mutually implied trust via tact and other formulae that preserve the face of others" in social interactions (Giddens 1984:50). These issues of power, trust and the motivation for action are crucial facets in the duality of structure and hence in the practice of strategy implementation and thus will form key constructs in this research.

In an attempt "to bridge the divide between deterministic, objective, and static notions of structure, on the one hand, and voluntaristic, subjective, and dynamic views, on the other" (Barley and Tolbert 1997:97), Giddens proposes two realms; the structural realm and the realm of action, mutually constituted in time, however he failed to develop and defend his ideas against criticism. These criticisms will be addressed in more detail later but relate to the conflation of structure and agency (Archer 1989), ignoring the dimensions of time and space (Herepath 2014) and for being too abstract and eclectic (Stones 2005; Archer 1989).

### 3.4.2 Structuration Theory in strategy and management research

To understand the potential of ST in the context of strategy as practice research., it is useful to critically evaluate the empirical research in area. Drawing on seminal reviews, e.g. Whittington 1992; Seidl and Whittington 2014) the utility of ST will be demonstrated in addition to explaining how researchers have addressed its criticisms or frailties and the opportunities that exist to develop ST for further research. Consequently, a "revised, stronger, framework of structuration" (Stones 2005:1) will be presented long with its nascent utilisation in management research.

Giddens himself did not empirically apply ST inside organisations (Parker 2006; Stones 2005), so the empirical work of SaP scholars is even more useful in understanding how it can be utilized. Hendry (2000) an early proponent of Strategy as Practice, argues that Giddens' Structuration Theory can be used "as a metatheoretical device for getting to grips with the innate complexity of the world" (2000:971). He supplements ST with discourse psychology, focusing on strategic decision making, and claims that ST can transcend traditional and critical positionalities on decision making to better understand the ephemeral and discursive nature of strategic decisions (Hendry 2000). Whittington (2011)

also argues for the utility of Giddens' ST in the context of SaP research, asserting its value in providing "attention to micro-sociological detail; a sensitivity to institutional context; and an openness to change" (Whittington 2011b:113).

Jarzabkowski (2008) utilises ST as an 'interpretive framework' to explain managerial strategizing, focusing on top management in a study of three UK universities, she identifies three strategising behaviours; Interactive, Procedural and Integrative. In this research, strategy is conceived as a structuration process, recognising that the institutional realm, or structure, is an accumulation of norms, beliefs and power relations that constitute a social order, which have longevity beyond individual actors; and that the action realm is contextually bound within this and yet is recursively reconstituting (Jarzabkowski 2008). Through detailed methodological explanation, Jarzabkowski reveals in detail how ST can be used empirically and in particular she makes clear how the issue of time/space distantiation can be addressed (2008). In an earlier publication, Jarzabkowski (2004) focussed on 'the common themes of recursive and adaptive practice' in strategic management (2004: 529) using social theory to explicate existing research. Drawing on Giddens' Structuration (1984) and Bourdieu's Habitus (1990) she presented an argument for the durability of practice, claiming,

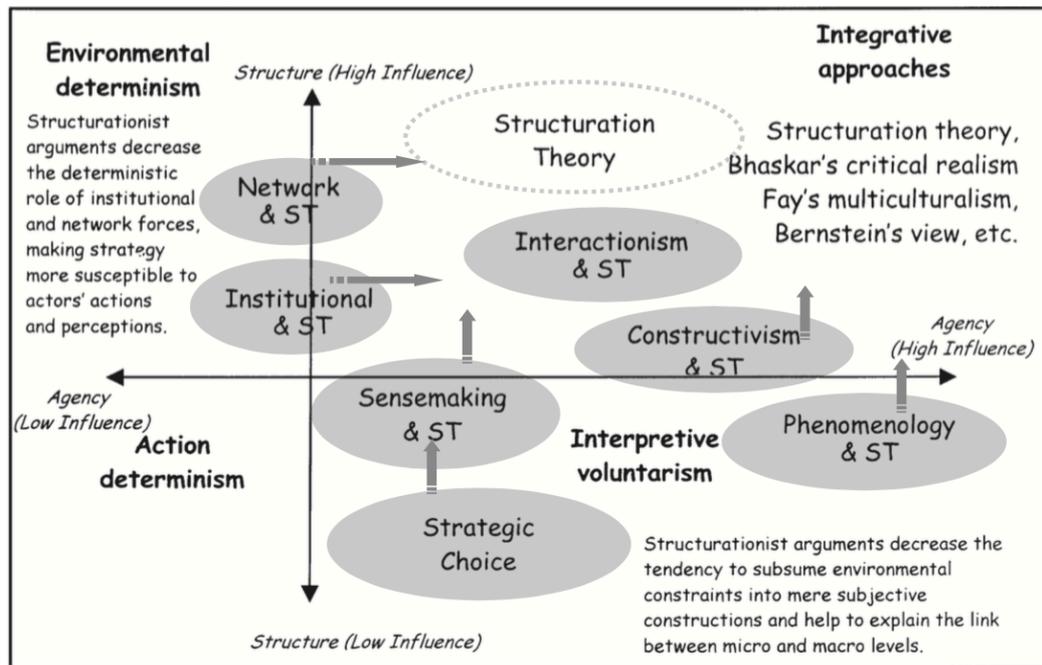
"practice is durable because of:  
Ontological security of actors  
Reciprocal interaction between agent and structure are embedded within daily routines of practice  
Sedimented structures are self-reinforcing, and  
Social institutions persist across time and space.  
Therefore, strategy as practice is recursive, routinized, and prone to inertia"  
(Source Jarzabkowski 2004:531)

She continues to present counter arguments, drawing on other social theories including, social becoming (Sztompka 1991), modernity and pluralism (Giddens 1991) and communities of practice (e.g. Lave 1991). These constructs support a counter narrative of adaptive practice where:

"Social movement occurs through interaction between macro and micro contexts. There are many micro-contexts, thus social institutions are divergent. Micro-contexts are prone to adaptation and learning through internal tensions generated from problems all the displacement and renewal of members. Therefore, strategy as practice is adaptive, flexible, and prone to learning and becoming"  
(Jarzabkowski 2004:534)

She proposes that different organisations will have recursive or adaptive tendencies dependent upon macro forces for change and micro contexts and actor cognition. This research shows how the use of Giddens can be used in combination with other theories, such as Bourdieu, to conceptualise strategy as practice and reveal the dynamic tension between change and stasis in organisations.

Figure 3.4 Pozzebon's effects of structurationist insights.



Source – Pozzebon (2004:265)

Pozzebon (2004) draws on an earlier paper by Whittington (1988), which proposes a Realist approach to the traditional dichotomies of voluntarism and determinism, plotting the relative influence of human agency and environmental determinisms on a scaled axis to create a two-by-two matrix. She draws on this matrix tool to support an analysis of published strategy research that utilises ST (covering work published between 1995-2000). Her analysis revealed ST being used increasingly in the latter years and in combination with other perspectives, (in the majority of cases, with Institutional Theory). She mapped the research studies onto the amended matrix, juxtaposing environmental/structural determinism with human agency to show the impact of structurationist insights and other key theoretical approaches (Figure 3.4). She revealed a move towards integrationist insights and concluded that such integrative approaches, particularly Giddens' ST, would be valuable to address the dichotomies and move strategy research forward. What is also interesting, is that she argues the adoption of structuration theory is a matter of ontological

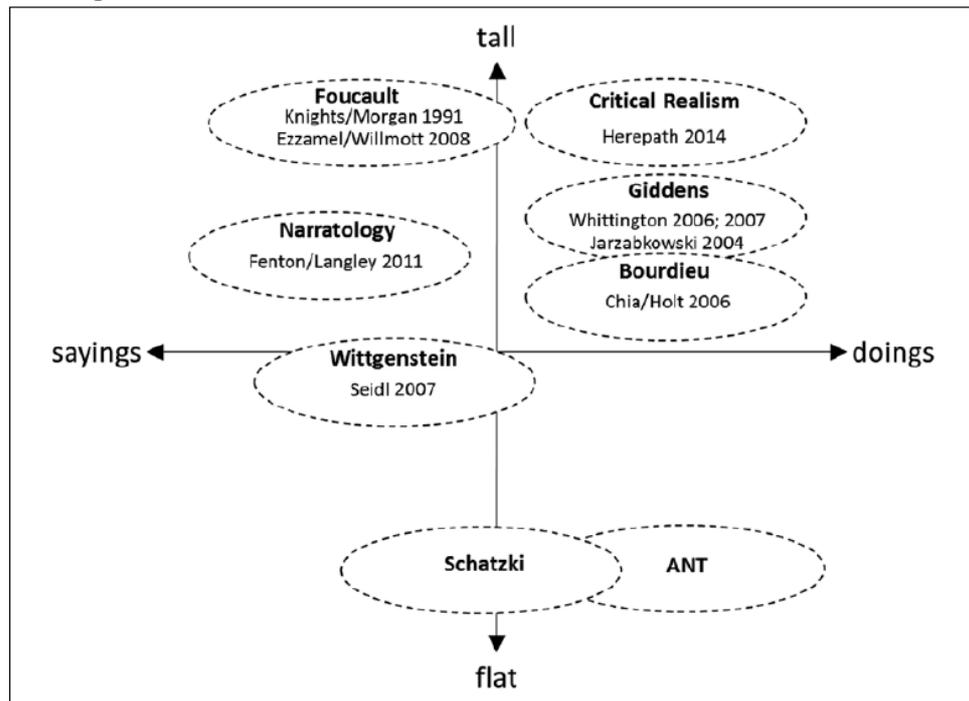
affinity (Pozzebon 2004). There is clear ontological affinity for this researcher, in terms of positionality and an interest in agency of Hotel GMs (ontology affinity will be discussed in greater depth in Chapter 4).

Later publishing with Pinsonneault (2005), Pozzebon explores the use of Giddens' ST in the field of Information Technology (IT) research. They reflect that although there is a great deal of discussion about Giddens' theoretical treatise on agency and structure, time and space, power, trust, and identity amongst other constructs, the application of Giddens core concepts by organisational theorists was still nascent (Pozzebon & Pinsonneault 2005). In contrast there is a 'cumulative tradition' in the empirical work of IT scholars that provides a potential resource for organisational theorists (Orlikowski & Barley 2001). They propose a methodological approach that addresses the difficulty of operationalizing Giddens in the field. The main relevance of their study here and now, is to acknowledge that ST is widely used in IT research but is difficult to operationalize.

Den Hond et al (2012) reflect the continuing interest in ST in the field of management and organisation studies. Their extensive review identified 407 articles that cited Giddens, published up to and including 2008, revealed 253 empirical studies that utilized, or referred to, three key sensitising constructs (also highlighted by Pozzebon & Pinsonneault 2005). These constructs; 1) duality of structure, 2) knowledgeability of actors and 3) notions of time and space are central to Giddens' ST and along with a multidimensional view of power. Den Hond et al (2012) categorised the articles based on the extent to which Giddens central ideas were utilised as follows; *in passing* (occasional reference for a variety of purposes); *a la carte* (deeper use 1 or 2 sensitising constructs); or *full monty* (explicit use in findings, central to conceptualisation of study) (2012: 247-248). Using selective illustrative examples, they explore the empirical value of ST, they see the value in ST 'not as a meta theory, nor as a broad framework' (2012:256) rather as a *process theory* that provides a sensitising device, or a building block, for explaining change in organisations. In the light of this, they suggest the processes of structuration can be "exemplified and made visible in scripts, routines, genres, practices, and discourses". (2012:256/7). This is the stuff of everyday organisational life and constitutes the day-to-day actions and decisions of (in the case of this research) middle managers.

Seidl & Whittington (2014) warn of the danger of micro-isolationism and drawing on papers previously published in *Organisation Studies* journal, they review the ontological stretch of theories-in-use in SaP studies. They characterise ‘tall’ ontologies as constructions of strategy “in which micro-level strategizing praxis depends hierarchically on larger macro structures or systems” and for ‘flat’ ontologies they argue for a broadening of scope to that which “stretches out sideways in the network of relationships” (2014:1408). They argue that by linking concepts with larger social phenomena or theories (e.g. macro-level discourses or profession-praxis relations) provides a stronger basis for theoretical contribution of SaP studies and the development of practice. Seidl and Whittington map the theories-in-use on a matrix that recognises the reach and focus of studies (See Figure 3.5), from tall and flat ontologies on one axis and to linguistic or practice orientation of doing and saying on the other.

Figure 3.5 - Spectrum of theoretical resources.



Seidl & Whittington (2014:1413)

The research presented in this thesis is situated in the top right-hand quadrant, being based on Giddens ST but with critical realist informed adaptations and the integration Bourdieu’s habitus, in the form of Stones’ Strong Structuration Theory (SST). By utilising SST and emphasising the position practice of the agents-in-focus, this study provides a tall ontology with the expectation to build stronger theoretical contribution (Seidl & Whittington 2014).

The body of strategy research utilising ST informs this study, by confirming the appropriateness of using ST for a practice-based study of strategy implementation within organisations. By recognising different institutional realms (Whittington 1992) and revealing the recursive or adaptive tendencies of different organisations (Jarzabskowski 2004), even when used with differing levels of emersion (Den Hond et al 2014), ST can connect the local (micro) practice with the meso and macro levels of sociocultural organisational setting to avoid micro-isolationism (Seidl and Whittington 2014). Micro-isolationism is the risk that by focussing closely on the detail of micro practices, researchers fail to observe and understand the important macro forces at play, so practice remains isolated and only partially understood (Burgelman et al 2018; Mantere 2005). This study will employ an improved, developed version of ST, which is acknowledged as a new ‘radical’ theory, that can address the who, where and what of strategy practice and thus make a contribution to the field of ST informed SaP literature.

Another body of research that utilizes Giddens ST is management accounting research (MAR), although this has little substantive bearing on the research question, due to the discipline focus, the outcomes of a recent review provides useful insights for this study. Englund, Gerdin and Burns (2011) carried out wide-ranging and comprehensive review of ST informed research covering 25 years of work, reviewing over 60 articles published in refereed journals. Identifying accounting as structure, artefact and interplay; they showed how accounting was modelled as all three dimensions of structure. What is important to note from this review, is that studies are predominantly at an institutional level and there is scant attention to agents. For example, the only study that's is contextually proximal to this research, is the case study research carried out by Ahrens and Chapman. This utilises Giddens ST as a sensitising device to understand contests of accountability, revealing fights over food margin in restaurant chains (Ahrens and Chapman 2002, Ahrens and Chapman 2004). Ahrens and Chapman’s research differs from this study in that it does not focus in detail at ontic level (i.e. the real, tangible, lived experience of agents) (Stones 2005), in fact surprisingly few studies have “empirically explored the day-to-day processes” (Englund et al 2011:507), which add importance to this study.

It has been shown that Giddens’ structuration theory has been utilized extensively in strategic management and accounting research “as a useful means of understanding social

aspects of management accounting” (Englund and Gerdin 2008:1130) and as a device for sensitising researchers (Ahrens and Chapman 2006; Busco 2009; Roberts 2014). In strategy research Giddens substantial influence is noted (Whittington 1992), ST can offer a ‘micro-sociological focus, “a sensitivity to institutional context and an openness to change’ (Whittington 2011b:113). Structuration theory has been utilised in a number of case studies addressing stability and change in accounting (e.g. Busco, Riccaboni and Scapens 2001; Granlund 2001; Macintosh and Scapens 1990) in strategy as practice to reveal middle manager sense making activities and knowledgeability (Balogun and Johnson 2005; Mantere 2008) thus it has conceptual legitimacy in this study.

### **3.5 Stones’ Strong Structuration Theory (SST)**

The value and use of Giddens ST in management and strategic research has been revealed, however this study utilises an adapted version of ST developed by Stones. Grounded in a discussion of the criticisms of Giddens ST, this section will explain and critically evaluate Stones’ SST, demonstrating its utility in the nascent body of empirical research published to date. This will set the scene for the theoretical development of a culturally augmented SST, which will contribute to the transdisciplinary aspirations of this thesis and form a significant contribution to knowledge.

#### **3.5.1 Strong Structuration Theory - addressing the criticisms of Giddens**

Giddens’ work is often criticised for being too abstract (Stones 2005; Jack and Kholeif 2008), for ignoring the dimensions of time and space (McLennan in Clark et al 1990; Herepath 2014) and for being eclectic (Archer 1989). Giddens is criticised by Archer for conflating agency and structure, “being too eager to examine both sides of the coin together” thus precluding the examination of “the interrelationship between one side and the other” (Ritzer 2007:172). Archer also bemoans the scant acknowledgement of temporal factors and diminution of culture, an important structural constituent in the social world. Stones (2005) addresses these criticisms of Giddens’ Structuration theory to develop his ‘strong structuration project’ recognising the quadripartite nature of structuration cycle and developing an ontology in-situ to address the abstract nature of Giddens’ original ‘ontology in general’ (Stones 2005). Importantly, Stones developed Strong Structuration Theory (SST) in defence of Giddens’ original contribution and in the light of its many criticisms

and empirical applications. Through the application of the quadripartite framework (shown in figure 3.6 below) it is possible to operationalize structuration to access the agent's knowledgeability of actions and systems (Elbasha & Wright 2017; Feeney and Pierce 2016; Harris et al 2016; Jack & Kholeif 2007).

Archer's (1985) article in the *British Journal of Sociology* (also published in her 1989 book) presents her case for conflation and her criticism of structuration theorists. Claiming the perpetuation of a 'myth of cultural integration' (1985:333), she argues that the concept of culture (cultural integration) obfuscates an analytical gaze and elides the distinction between 'logical' relations (pertaining to the cultural system) from the 'causal' connections (pertaining to the socio-cultural level). Archer uses the word elide or elision to convey simultaneously, the omission and combination of fundamentally different elements of cultural change, calling for an end to conflation of the "properties of a cultural system and the features of socio-cultural integration" (Archer 1985:351).

Archer (1995) continues to criticise structurationists for central conflation, by not developing the temporal dimensions of structural elaboration or the mechanisms inherent in the process (Archer 1995) or elaborating on 'virtual' structural forms. Stones argues that this reading of Giddens is at best unsympathetic and at worst misleading, arguing that although some elements of the structuration process are undeveloped, the central tenets remain valid. Although it is widely accepted that "Giddens, arguably, fails to clearly distinguish between the structures that precede and emerge from the exercise of human agency" (Modell 2017:23). The conversations and debates surrounding the ontological positions of Critical Realists (such as Archer and Bhaskar) and other social theorists (such as, Giddens, Bourdieu often cited as integrationists) have led to "an ontological synthesis pivoting on the interplay between exogenous (external/objective) structures and endogenous (internal/subjective) structures" (Modell 2017:33).

Accepting the reflexive capacity for agency yet acknowledging the pre-existence of structures, thus connecting the ontological and empirical realms, Stones provides a "hinge between structure and agency" (Parker 2006:125). Stones refines ST to elucidate four analytically distinguishable yet "inter-linked aspects of the duality of structure" (Stones 2005:84). In doing so he addresses the problem of temporal nature of the 'cycle' of

structuration<sup>4</sup>, accepting connections through time and space and accepting the variable nature of agents. Through the development of the notion of ontology-in-situ, Stones (not uncontroversially), connects the empirical ontic experience of agents with Giddens' abstract, ontology in general, by limiting the action horizon and drawing on Cohen's idea of position practices. Position practices (drawing on Bhaskar's definition and Cohen's elaboration of Giddens' notion of social structures) provide a 'complex apparatus' (Stones 2005:65) to create a bridge between larger structural forces and reflexive hermeneutical practices of agents. (Parker 2006; Stones 2005). In this way Stones has attempted to synthesise Critical Realism (CR) and ST and in doing so provide an empirically useful theory of structuration.

### 3.5.2 The Quadripartite Framework

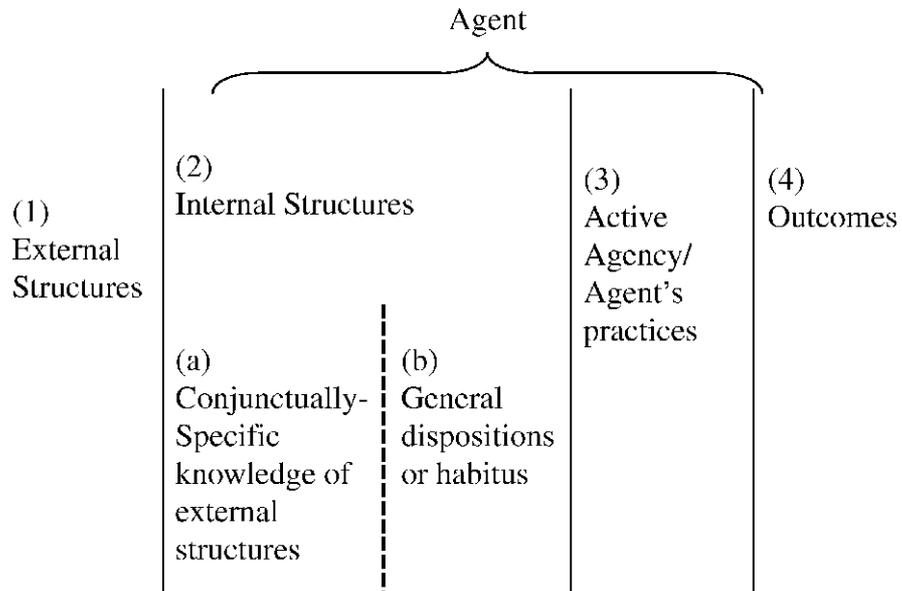
Parker claims that Stones has created "his own radically different and original theory", moving "(F)rom all and everywhere to Who did What, Where, When, How and Why?" (2006:122). Stones' adaptations are informed by a synthesis of theories associated with social psychology, namely, phenomenology, ethnomethodology and symbolic interactionism (Greenhalgh and Stones 2010). As mentioned above, Stones takes Giddens' ontology in general and explicates an ontology-in-situ, he elaborates on external structures and the structuration process to provide practical guidance and empirical utility previously lacking (Archer 1995; Jack and Kholeif 2007; Elbasha and Wright 2017).

Stones' (2005) Quadripartite framework (shown in figure 3.6) is made up of four key elements including External structures, Internal structures, Active agency, and Outcomes. Each element is implicated in the cycle structuration and will be explained below, starting with the hermeneutic core i.e. internal structures.

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<sup>4</sup> Stones' quadripartite model has been likened to Archer's Morphogenetic Cycle by Parker 2006

Figure 3.6 – Quadripartite nature of structuration.



**Source:** Stones (2005, p.85)

Internal structures are developed by Stones to overcome the potential conflation left by Giddens' lack of clear distinction between, the sources of internal 'virtual' structures. Stones draws on Sewell's (1992) notion of 'cultural schemas', and Bourdieu's Habitus to draw out distinctive elements to internal structures. The term General Dispositions and Habitus can be used interchangeably, however, for Stones this constitutes a less deterministic interpretation of Bourdieu's habitus. General Dispositions thus comprise,

“transposable skills and dispositions, including generalised worldviews and cultural schemas, classifications, typifications of things, people and networks, principles of action, typified recipes of action, deep binary frameworks of signification, associative chains and connotations of discourse, habits speech and gesture, and methodologies for adapting this generalised knowledge to arrange of particular practices in particular locations in time and space” (Stones 2005:88).

This comprehensive description includes key “dispositions and discourses inherited from prior socialisation and past practices” (Stones 2005:88). Much of this is taken-for-granted, but not immutable, at times the external conditions can become unsettling, making agents “suddenly conscious of that which previously pre-reflexive” (Stones 2005:88). This is important as although general in nature and pre-existing the moment of action, they result from cultural exposure and discourse over time.

Conjuncturally Specific Knowledge External Structures - 2(a) above – (shortened to Contextual Knowledge) refer to the contextual or conjunctural setting, connecting ontology in general to ontology in situ. The positional, as opposed to the dispositional, refers to the role or position of the agent occupied and captures notions of power, legitimation and signification. Unique to the agent-in-focus, due to his or her own subjectivity consisting of “knowledge of the interpretive schemes, power capacities, and the normative expectations” (Stones 2005:91). Linked to role, built up over time or “gleaned in the course of an unfolding interaction” (Stones 2005:91) contextual knowledge is specific to the time and place. Within a given role there are expectations, routines and rules of behaviour, power over resources and people and interpretative schemas of meaning to facilitate sense-making and communication. The knowledge and capacity to mobilise these are developed overtime through practice and training, both formal and informal, as such these position practices form internalised structures summarised as rules and resources. Consequently, the General managers in this study will have imbued, and be conscious of, to a lesser or greater extent, the expectations of their role. This role or position is inhabited by an agent, or a cluster of agents, within a context of other positions practices, thus it is important to recognise the position practice relations. This web of relations is part of the conjunctural setting and is expanded in more depth below.

Active agency is the fundamental moment of structuration, which employs the two kinds of internal structure and can be a conscious strategic decision or simply as act of pre-reflexive automatic ‘doing’. The day-to-day practice of middle managers involves constant doing, deciding and acting that requires energy, Stones identifies five aspects of active agency;

- Shifting horizons of action,
- Creativity, improvisation and innovation
- Degrees of critical distance and reflection
- Conscious and unconscious motivations
- The ordering of concerns or the sorting out of priorities into a hierarchy of purposes. This may involve more or less critical reflection.

Source: Stones (2005:101)

It is important to recognise that Giddens probably overemphasised the ability of agents to resist, to choose to do otherwise, and Stones reminds readers of the inherent ability and validity of just carrying on and researchers to avoid an inappropriate emphasis on change. To resist agents must possess adequate power and capability to act, knowledge of

alternatives and consequences, and sufficient critical distance or “requisite reflective distance” (Stones 2005:114) to take a position in relation to external structures and their conjunctural manifestation. Thus, active agency is accomplished and complex process, drawing on agents’ knowledgeability and motivations that results in outcomes (intended and unintended). These outcomes may be events or structures, either external or internal, reinforced or changed, which become the context or medium for agency in the next cycle.

External structures provide the conditions for action, they are autonomous and have “independent causal influence” on the agent or agents-in-focus (Stones 2005:110). They can be conceived as more or less abstract, broad manifestations of power, legitimacy and meaning contained in social systems and networked position-practices, or as more concrete in-situ, conjunctural to the agent-in-focus. External structures are largely mediated through position-practices. “A position-practice is a social position and associated identity and practice, together with a network of social relations which recognised and support it”, “which include various institutional reciprocities and asymmetric power relations and institutional infrastructures” such as industry norms and values or strategic intent and mission statements of large for-profit corporations (Greenhalgh and Stones (2010:1288). These structures and their subjective counterpart (internal structures) can be recursively reproduced or adapted through continuous cycles of structuration.

Stones’ quadripartite framework facilitates methodological bracketing, which can be argued to address the conflation concerns of Archer (1985). Through developing Giddens’ institutional analysis, Stones proposes two forms of bracketing Agents’ Conduct analysis and context analysis. Agents’ *conduct* analysis will be used

“.. to explore the motives, knowledgeability, skills (beliefs, purposes, intentions and so on) of given actors, whereas agent’ *context* analysis would be used ..... for a knowledge of the terrain (strategic, ethical, communicative, aesthetic) ..... that constituted the range of possibilities and limits to possible” (Stones 1991:98).

According to Parker (2006) conduct analysis is at the core of Strong Structuration’s analytical power revealing the processes of reflection and agents Stones (2005) also notes that for many enquiries there will be a need to address both conduct and context analysis. He proposes that conjuncturally-specific internal structures, can “act as a kind of hinge between external structures, on the one hand, and general-dispositional frames” on the

other (Stones 2005:123). In this way, Stones achieves “a systematic attention to epistemology and methodology” (2005:189), this process of methodological bracketing will be discussed in more depth in the methodology chapter. The classic dimensions of structuration, signification, legitimation and domination, are less explicit in SST, being integrated into the quadripartite framework as internalised structures, actions and outcomes, and manifest through position practice relations.

Position practice relations, arguably provide the missing link between structure and agency, providing a bridge (Coad and Glyptis 2014; Cohen 1989; Stones 2005). They connect the ontology in general to the ontology in situ. Cohen (1989) discussed Thrift’s (1985) criticism of Giddens failure to develop this link, acknowledging Giddens notion of social position. Giddens refuted the deterministic qualities of role-concepts to develop social position concept, but failed, according to Cohen, to fully develop their performative nature. Cohen acknowledges that Bhaskar’s structurally imbued ‘slots’ (which constitute predetermined rights, duties and tasks), fail to fully account for agency and role-taking. For Cohen, position practice relations comprise properties including: “Positional identities embedded in qualifications, observable attributes, associated with obligations and privileges; Clusters of practices that make manifest the rights and obligations that are acknowledged by others; and institutional reciprocities, including asymmetrical power relations” (extracted and compiled from Cohen 1989:210; Stones 2005:62).

As such “position practices (and position practice relations) endure as structured clusters of institutions even as successive cohorts or generations of agents participate in system reproduction” (Cohen 1989:210) as such they are independent of the incumbents. In this way, a common view can be construed of what it means to be a Teacher, a Doctor, an Accountant, a Chief Executive Officer, or in the case of this research a Hotel General Manager (GM). There is however, a danger that must be resisted, to reify this construct and assume that all incumbents are the same. Archer’s emphasis on “the *sui generis* nature of external structures” (Stones 2005:64) is key to permitting a duality of structure and agency and hence a structuration process.

Position practices can be viewed “as structured praxis performed by knowledgeable actors” (Coad & Glyptis 2014:146) who are reflectively conscious of an identity and who actively employ rules and resources through their capability. The notion of position

practice relations was powerfully elaborated by Coad and Glyptis (2014) in their study of a joint venture between a state-owned oil company and shipping company. They utilized four analytical components of positioning, praxis, capabilities (of agents) and the role of trust. They were able to map position-practice relations, understand asymmetries of power and reveal the active agency operating in the face of structural contradictions. They found that position practice perspective can provide a valuable additional tool for researchers which complements earlier structuration studies in accounting and control (Coad and Glyptis 2014). Moore and McPhail (2016) emphasize the positioning and capabilities of agents, obligations and prerogatives of a given position are potentially reconstituted through action (Moore and McPhail 2016). This agency requires “the exercise of power... acts of communication” and meaning making (Rouleau 2005) and the “awareness of normative approval or sanctions” (Coad and Glyptis 2014:147). In this study, the Hotel GMs constitute the agent-in-focus and their position practice relations will be explored to reveal the processes of structuration associated with their day to day implementation of strategic change. In this way, this meso level concept links agency and structure and provides a ‘bridge’ (Stones 2005:65) from the macro to the micro, providing a device for mapping the agent-in-focus within the ‘in-situ’ field.

These position practices are independent of the agents at hand, thus they persist in time and space, but they are constantly reproduced in action and thus the “agents-in-focus must always be conceptualised as being caught up in the ebb and flow of position-practice relations” (Coad and Herbert 2009:179). The notion of position practices links to another key construct, that of institutionalisation. According to Berger and Luckman, “Institutionalisation occurs whenever there is a reciprocal typification of habitualized actions by types of actors” (1966:72). The role and expectations associated with the practice of GMs (in this case), constitute a cultural schema (Coad and Herbert 2009; Moore and McPhail 2016; Parker 2006). These schemas, represented by position practices, are “predefined patterns of conduct” (Berger and Luckman 1966:72) “embodied in pre-reflexive tacit knowledge” (Busco, Riccaboni and Scapens 2006:16) which becomes embedded in the agents’ conjuncturally-specific knowledge of external structures (Stones 2005:89) (referred to as ‘conjunctural knowledge’ for ease). In other words, agents such as Teachers, Doctors or Hotel GMs (in this case) learn to act like GMs, through a process of repeated reaffirmation within the daily experiences, these expectations of behaviour

(included in position practices) then become part of the external structure that guides their action.

Stones also draws on symbolic interactionism (Greenhalgh & Stones 2010), to integrate Goffman's notions of 'social self' and 'role playing' that will imbue agents' practices. Goffman's ideas of performative labour and face working are evident in many service arenas, such as airlines and health care (Sheehan 2012; Sheehan 2020) and are particularly pertinent in this research in the context of hotels (Blue and Harun 2003), where agents are constantly moving literally from front of house to back of house (Slatten and Mehmetoglu 2011). These notions, of self and role, have the ability to illuminate practice, and are relevant in this study. Thus, it can be argued that Strong Structuration Theory provides the functional equipment to focus on the agent in situ and provides the framework for empirical investigation of practice, whilst simultaneously encompassing key constructs of habitus, institutionalisation, and role.

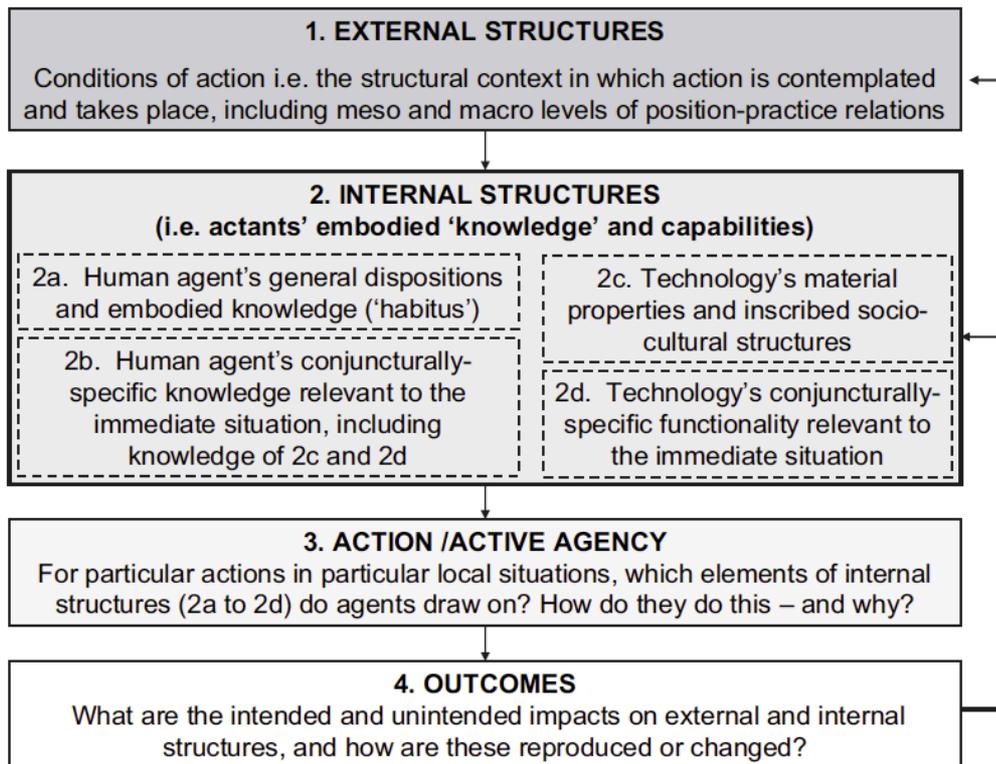
Although, as Inglis will stress, sociologists "are generally in the business of stereotyping people" (2005:19), Whittington (1992) warns against reductionism, developing a pluralist understanding of general dispositions and internal structures. Arguing that when agents are considered within a wider social setting (incorporating institutions such as the family, church, ethnic group, or professional) a broader understanding of "discursive-schemas, orientations and principles for action" can be considered (Stones 2005:105) and the degree or latitude for choice is widened (Whittington 1992). Whittington draws on examples of black American entrepreneurs, Lancashire textiles firms and Sir Clive Sinclair to demonstrate how dispositions and ideologies from different social domains can impact in the corporate domain. Put simply, a manager may understand the imperative of profit driven by a capitalist system, but also acknowledge the needs and value of family life when making decisions about redundancies. Human agents will draw upon the structures of significance, domination and legitimation, relative to their current context, this is part of the contribution of Stones theory, although Parker (2006) remains unconvinced, Stones is now gaining wider acceptance and use in management studies.

### 3.5.3 Nascent research utilizing SST

SST has been introduced and the quadripartite framework critically evaluated, and although its empirical utility has been promoted, it has not been proven. To this end the following brief review will demonstrate how SST is starting to be utilised in management research. In addition to showing the value of SST for empirical research, it will show there is a possibility to be at the forefront of research and make a contribution to knowledge. SST is a relatively new theoretical framework that is being disseminated through workshops, journals (Coad and Glyptis 2014) and special issues (Coad et al 2016), mainly led by Prof Lisa Jack in the UK. In addition, annual workshops run by Rob Stones himself at George Washington University in Washington D.C. (USA) has generated a small community of scholars associated with the “Graduate School of Education and Human Development” resulting in “probably 15 doctoral theses that have now used SST” (Stones and Jack 2016:1150). It has been used extensively by Professor Tricia Greenhalgh in research into IT system implementation and change in the NHS (Greenhalgh and Stones 2010; Greenhalgh, Stones and Swinglehurst 2014). Also, there is isolated use, for example, by Karen O’Reilly in migration studies and Ruth Barley researching identity and social interaction in education (Barley 2014; O’Reilly 2012).

Greenhalgh and Stones’ (2010) contribution is noteworthy as they chose to utilise SST over Actor Network Theory (commonly used in the Information Technology research community), acknowledging the need for a more sophisticated theory of human agency. What is also interesting about their study is how they integrated technology into the quadripartite framework (see figure 3.7). Greenhalgh was influenced by ANT, using the term ‘actants’ to reflect the human and non-human agency within the structuration process. They have adapted SST to present “a new conceptual model for considering the fortunes of big IT programmes” (Greenhalgh and Stones 2010:1290) they continue to acknowledge that the position practices embedded in structures are implicated in human and non-human agency and that technology plays a part in changing or reproducing social structures.

Figure 3.7 Adapted SST incorporating technology dimension.



Source: Greenhalgh and Stones (2010:1290)

Wilcox (2007) drew on innovations in SST, utilising Stones' approach to bracketing to overcome the weaknesses of Giddens. In her study of agency, legitimacy and change in a large global airline based in Australia, she used "Stones' distinction between "agents-in-focus" and "agents-in-context" to distinguish between actors seeking legitimacy and those conferring it or influencing the context in some other way" (Wilcox 2007:4/5). Broady-Preston (2009) reviewed several (structuration based) social theory frameworks to propose SST as appropriate, "either singly or in combination with SIT"<sup>5</sup> for studying "change conflict and professional identity" (2009:177). She went on to publish her findings about the future of Information Professionals in 2010 in the journal of library management.

There is a cluster of work utilising SST emerging in the field of accounting; Jack and Kholeif (2007; 2008) are the first academics to propose SST, acknowledging its differentiation from Actor Network Theory. They use SST to support the reinterpretation of data in two separate empirical studies they have undertaken, which were both designed

<sup>5</sup> SIT = Social Identity Theory

prior to the publication in 2005 of Stones' Structuration Theory. Drawing comparatively on two current papers (Ahrens and Chapman 2006 and Pozzebon and Pinsonneault 2005), they argue that SST is particularly suited to case study research because "the position of the researcher is presented as analogous to that of an investigator elucidating the case through evidence, theory, experience and intuition" (Jack and Kholeif 2007:29). At this stage, SST had rarely been used to influence research design, despite this, even with ex-post application, they advocate the introduction of SST at the design stage of empirical studies to "impose a discipline on researchers to ask more penetrating questions of their sources and themselves" (Jack and Kholeif 2007:28). SST proved to have analytical purchase for Jack and Kholeif (2008) who investigated the implementation of Enterprise Resource Planning (ERP) systems in Egypt and the changing role and practices of Management Accountants. SST was able to expose the different "perceptions of actors of the boundaries between internal and external organisations" and exposed contradictory expectations which were constrained 'by position-practices of actors' (Jack and Kholeif 2008:43).

Subsequently SST has been utilised in the design phase of research (Coad and Glyptis 2014; Feeny and Pierce 2016; Makrygiannakis and Jack 2016). Most of the published SST informed research was collated in a recent Accounting, Auditing and Accountability Journal (AAAJ) special edition (Coad et al 2016) which brought together four empirical studies all of which built SST in at the design phase (Feeny and Pierce 2016; Harris et al 2016; Makrygiannakis and Jack 2016; Moore and McPhail 2016)<sup>6</sup>. Coad et al (2016) observe that "Stones (2005) offers an alternative approach which provides an emphasis on epistemology rather than ontology" (2016:1141), in an interview with Rob Stones, included in this special issue (Stones and Jack 2016) he confirms that SST is 'ecumenical' and can be combined with other theories and constructs to "better address the problem at hand" (2016:1147). In this study, the complex notion of culture is integrated into the structuration process within the quadripartite framework (Stones 2005). This research is summarised in table 3.2.

The studies in this special issue of AAAJ and other extant literature presented here, demonstrate the utility of SST in a variety of contexts with a range of research questions.

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<sup>6</sup> Other studies known to the author remain as unpublished PhDs

They also reflect the developing approach to engaging with SST, initially the quadripartite framework was used simply for data classification, but now there is a move to build SST into research at the design phase to explore active agency and explicate both agents' conduct analysis and context analysis (Coad et al 2016). There is still an acknowledged opportunity (or need) to explore and expand, through use, the utility of SST and the impact in more empirical research and other discipline domains. This is where this study can make a contribution, through using SST with a micro focus linked to institutional context of strategy implementation and by combining SST with other constructs such as Culture, this study will provide a new way of understanding human agency in the context of strategy implementation.

Table 3.3 Summary of published research in accounting utilising SST

| Authors(year)                  | Brief details   | Use of SST |          |
|--------------------------------|---|------------|----------|
|                                |   | Design     | Analysis |
| Adhikari and Jayasinghe (2017) | Emphasised the 'agents-in-focus' and 'agents-in-context', adopting of the Stones' bracketing and bridging constructs, to develop a nuanced view of government accounting practices in Nepal.  |            | √        |
| Elmassi et al (2016)           | SST utilised to reveal agency-structure relationships to investigate SIDM processes in post-revolution Egypt, a context that is characterised by extreme uncertainty.   |            | √        |
| Feeny and Pierce (2016)        | Use of Accounting Information in New Product Development. Clusters of actors modified and reformed external and internal structures through action. SST provided conceptual and methodological tool to understand web-like social systems.                                  | √          | √        |
| Harris et al (2016)            | Analysed 18 published case studies in the domain of strategic investment decision making (SIDM). Having considered the benefits of other theoretical alternatives, such as Actor Network Theory and Personal Construct Theory, they conclude that SST is the most suitable. |            | √        |
| Maktygiannikis and Jack (2016) | Studied the impact of the 2008 Greek financial crisis on budgeting and control practices in Greek hotels Observing a move from normative budget practice to modified proactive approach.  |            | √        |
| Moore and McPhail (2016)       | Ex-post analysis and employed the concept of position practice relations to explore carbon accounting practices in an Australian utility company.   |            | √        |

There remains one further study that is worthy of inclusion here, by virtue of the fact that it utilises SST in the Strategy as Practice discipline domain. Elbasha and Wright (2017) promote the use of SST to address a research questions relating to strategy implementation. This conceptual paper does not present empirical findings but recommends the use of SST

to address the micro-isolationism that is associated with some SaP research (Vaara & Whittington 2012). It is argued by Elbasha and Wright, that SST can bridge the micro/macro gap and bring more depth to practice based studies. They use the example of Jarzabkowski's 2008 study of universities to show how SST can "locate the top management team within a clear societal context" (Elbasha & Wright 2017:121). This is the first example, found by the researcher within the extant literature, that brings together, SST and SaP, although yet unpublished Elbasha's PhD thesis is focussing on UK Optical Retail company strategic change initiatives, which still provides clear space for contribution from this study. In summary, the review of literature demonstrates that this study is at the forefront of a nascent area of management research utilising SST.

It is important to consider alternative theories to SST. Actor Network Theory (ANT) which is a popular method used within social sciences (Hassard in Thorpe and Holt 2008) has not been adopted in this study; this section will briefly explain why. ANT developed by Latour and Woolgar (1979) focusses on networks which are made up of people and technologies, importantly it affords equal status to human and non-human (actants) in the networks (Latour 2007). It is often used in studies of information systems and technology and was used in combination with SST by Trisha Greenhalgh to the implementation of a controversial IT system in the NHS (mentioned earlier). It is criticised for its flat ontology, and the lack of consideration given to pre-existing layers within structures and agents (Greenhalgh & Stones 2010). The second major criticism of ANT is the symmetry it affords to people and things, resulting in an obfuscation of human motivations, ethics and qualities. In this study of middle managers practice, there is not a significant or single technology at play, rather the socially constructed human concept of culture, as such ANT would not be an appropriate theoretical frame.

This review of extant literature utilising SST provides clear evidence of the gap in knowledge being addressed in this thesis. It reveals SST as a useful nascent explanatory theory, revealing the approaches taken by researchers. In addition, demonstrating the emphasis on position practice relations and the value and efficacy of Stones' approach to bracketing using agent's context analysis and agent's conduct analysis.

### 3.6 Strong Structuration Theory – emphasising Culture.

In line with the transdisciplinary aspirations of this thesis, a new adapted framework will be presented that will endeavour to integrate culture (without it being lost or reified) into a model of agency, thus combining anthropological constructs and sociological theory in a novel way to form a culturally explicit Strong Structuration Theory. The adaptation of theories is often shied away from by researchers, Mutch in Anfara and Mertz (2006) recognises our reticence to adapt. Referring to the use of Bourdieu, he states,

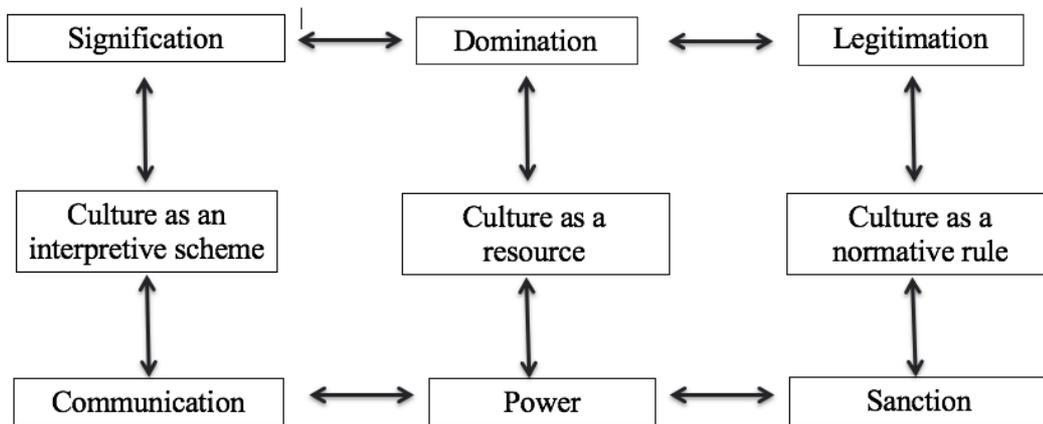
“I often think we are frightened of theories (and theorists, especially ones as esteemed as Bourdieu); but I would like to argue that if we use their theories or models with sensitivity, adapting them to suit our purposes while keeping their integrity intact, they are wonderfully illuminating tools”. (Mutch 2006:172).

Stones is open to such a proposition even stating that SST is ‘ecumenical’ (Stones and Jack 2016:1147). So, drawing on Giddens’ Structuration Theory and then mapping onto and adapting Stones’ SST, Culture will be implicated in the practice of strategy implementation through an adapted culturally imbued structurationist theoretical framework.

#### 3.6.1 Culture as a modality of structure

Following Sydow’s adaptation of the modalities of structure in relation to trust (Sydow 1998), the role of culture as a modality in the dimensions of structuration will be developed. Through the active agency of middle managers, culture can be shown to be an authoritative resource and a rule of signification and legitimisation. It will be shown that culture is clearly a structural construct, which can however be reformed and changed through the active agency of managers. This section will then continue to map culture onto the quadripartite framework of SST utilised in this study. Figure 3.8 below shows an augmented version of Giddens structuration diagramme implicating culture in the modalities of structure (Signification, Legitimation and Domination for short abbreviated to SLD).

Figure 3.8 The role of culture in the duality of structure



Adapted from Sydow 1998:40 and Giddens 1984:29

Culture can be conceived as a rule of signification, if we accept the earlier discussion about Culture, as an “assemblage of meanings and meaning making processes” (Lewis 2002:39) then it can be expected that culture will be a modality of structuration. Culture will guide agents to interpret situations and the practise of others in certain ways and will lead to discourses and particular communicative practices, for example justifying actions in the context of the corporate espoused strategy, or organisational stories used to justify or explain actions. Examples in the published literature include, Sydow (1998) who draws on Boden (1994) to show how rules of signification are reproduced and become institutionalised over time through interorganisational communication, managers’ so called ‘talk-in-interaction’ (Sydow 1998:37) emphasising the importance of trust. In addition, studies of sensemaking in strategy as practice literature (Rouleau 2005) show the role of managers reinforcing structures of signification, by drawing on “deep knowledge of organisational rules and sociocultural rules” (Rouleau & Balogun 2011:974). Also, Brubakk and Wilkinson (1996b) studied retail banks and found corporate culture management following financial crisis. Espoused culture thus can be utilised to assist with institutionalising ways of meaning making and provide a clear guide to ‘what matters around here’, in structuration terms, culture provides rules of signification.

Giddens recognises the ability of agents, who have the capacity, to draw on resources to exercise power and influence praxis. Culture can be seen as an authoritative resource, in the dialectic of control. Within a given cultural context power can be exerted upward and downward, power structures are embedded in the roles, or position practices of agents, in

the field. In this study the agents-in-focus are middle managers, who are at the nexus of strategy implementation, power dynamics and also organisational structures. Therefore, either through role responsibility, or ability and capability to martial culturally embedded constructs (such as beliefs, routines, language and images), they are agents who can exert power. For example, Service organisations will usually display a customer orientation (Nielsen, Bukh & Mols 2000; Peacock 1995; Tepeci and Barlett 2002), they will have particular culturally based approaches to people - often called talent (Goss-Turner 2010). These ways of being and doing can, for example, be used to leverage more effort from staff, or resist cost cutting demands of head office, in the ongoing day-to-day implementation of strategy.

Finally, culture can be conceived as a rule of legitimation, in this way culture provides norms and expectations about how to act in any given circumstance, provides a basis for action. Embedded in the position practices, or roles of agents in the field, and inculcated through systematic training, organisation 'stocks of knowledge' (Berger and Luckman 1966) will emerge and evolve over time to provide normative guide for action. Actors will know what the sanctions are for digressing from the legitimised behaviours and ways of being and doing, for example implementing strategy by following central buying policy or not and adhering to brand standards or engaging in symbolic action (Geertz 1973).

Culture can be seen as a modality for the dimensions of structuration (SLD) and thus implicated in the structuration process., however, in Stones' SST, these dimensions of structure are made less explicit. So it is useful to track them into the quadripartite model and theorise culture's role in the four stages of the Strong Structuration process. Greenhalgh and Stones (2010) explain that Giddens original "highly abstract' terminology, interpretive schemas (S), normative expectations (L) and capacity to mobilise (D) can be made accessible. "SST focuses particularly on the concrete ways in which agents combine these and other analytic components when considering the strategic terrain." (Greenhalgh and Stones 2010:1288/9) This explains how Stones develops an ontology-in-situ which assimilates SLD into internal structures of the quadripartite framework, by bringing the macro constructs of SLD into the internalised external structures, relevant to the strategic terrain, or conjunctural circumstances, of action. The next section will show how culture is implicated in the stages of the Strong structuration process by articulating a culturally inflected quadripartite framework (see figure 3.9).

3.6.2 Culture as external structure embodied in Position-Practices

As explained earlier in this chapter, external structures constitute the conditions for action and are autonomous of the agent-in-focus. Structures in Giddens ST are considered virtual, held in memory traces. Culture can be viewed as an external structure, reflecting on Hays' conceptualisation of culture presented earlier and repeated here.

“Culture must be understood as a social structure if the term is to be consistently applied. Culture is social, durable, layered pattern of cognitive and normative systems that are at once material and ideal, objective and subjective, embodied in artefacts and embedded in behaviour, passed about in interaction, internalized in personalities and externalized in institutions” (Hays 1994:65)

As such culture can be conceived as an external structure, in this study, the role of culture will be viewed as a pluralist external structure which, in keeping with Stones' articulation of in-situ agency, is embedded in position practice relations. Agents in this study will experience, to a lesser or greater extent, an ability and desire to confirm or resist. Stones agrees with many that Giddens gave too much emphasis to actors' ability 'to do otherwise', instead he emphasises the “dignity in an agent's ability and choice to just carry on instead of doing otherwise” (Stones 2005:113).

This does not deny the knowledgeable ability of actors/agents. Agents' hermeneutic facility is often applied to generate “a realistic enough appraisal of the independent external conditions and the matrix of sanctions and rewards they promise” (Stones 2005:112). The implication being that “[R]eal people are less free to do otherwise than abstract agents” (Stones 2005:112). In this study, middle managers day-to-day decision making in strategy implementation will be studied, and the role of culture will be revealed. Culture as we have seen earlier can provide a control mechanism (Geertz 1973) to be resisted or not, also as a source of ontological security (Giddens 1984) and as a source of power (Etzioni 1975), each drawn on reflexively by active agents in situ.



Culture provides rules and norms that guide behaviour, in short hand ‘what matters around here’ (Geertz 1973; Alvesson 2002) and provides cultural schemas (Sewell 1992) utilised by agents interpreting situations. Service businesses, and hotels in particular, have been acknowledged to have distinctive cultural attributes (Bavik 2016; Dawson and Abbott 2011). As mentioned earlier, often described as strong and customer orientated (Ogbonna & Harris 2002; Goss-Turner 2010; Brander Brown 2002), with a unique focus on the customer (Korczynski 2002). In this context, selection, to attract the “right sort of people” (Korczynski 2002:3). and training are designed to inculcate and fix certain behaviours in a service culture (Korczynski 2002; Paraskevas 2001a) These purposefully selected and retained, middle managers are a focal point for cultural continuity and change (Alvesson 2002; Brubakk and Wilkinson 1996b; Harris and Ogbonna 2002). Position-practice relations connect the ‘macro’ industry norms and the ‘meso’ organisational strategy and culture to the ‘micro’ practices of the agents-in-focus of this study. Thereby drawing a connecting thread between domains at different ontological levels, that of industry, profession, company, and department, thus position practice relations provide the connecting tissue for organisational culture and strategy implementation.

### 3.6.3 Culture as internal structures, culture in action.

Stones makes a clear distinction between the two forms of internal structure; Conjuncturally-specific Knowledge External Structures and General Dispositions and Habitus. The latter are “more transposable and generalisable schemas” (Stones 2005:87) considered to be “unconscious schemata acquired through lasting exposure to particular social conditions” (Wacquant 2008:267). The former is conceptually linked to the contextual or conjunctural setting, connecting ontology in general to ontology in situ, the fundamental ‘positional’ nature of these internal structures are thus connected through role. Through these positions or roles, agents have access to virtual internal structures, including rules and resources. Sewell (1992) prefers the notion of cultural schemas to ‘rules’, because the latter implies homogeneity, rather than reflecting the complex and conjuncturally (or context) specific notion of norms and meaning making. Thus, the agents’ understanding of the world and their strategic terrain, is culturally inflected, the cultural context will impact upon their own evaluation of the in-situ context and the options available to them and the issues they face in day to day life.

Acknowledging the earlier argument relating to organisational subcultures (Paoline 2004; Palmer et al 2010) and Schein's view that when occupations share education and training, members of that occupation or role develop "shared learning of attitudes, norms and values" (Schein 2004:20). It is reasonable to assume that the position practice roles of (in the case of this study) Hotel General Managers, will share common understanding of their rights and obligations. Through dispositional discourse these 'roles' (Cohen 1989), or slots (to use Bhaskar's phrase), will endure and be reconstituted through action. Hofstede et al (1990) found evidence of organisational cultures to be centred around "shared perceptions of daily practices" (1990:311) arguing that although values are established in early life, both practices and values are inculcated "through socialisation in the workplace (Hofstede et al 1990). Thus, it could be presumed that occupational cultures will develop over time, arguably the longer an actor remains in an organisation/industry the more these shared practices and values will be instantiated or crystallised.

It is important to take a note of caution here, to avoid reification of these structures of signification, legitimation and domination. Although sedimentation occurs over time, change is always possible (Lewis 2002); this comes from agents' reflexivity (Archer 2012) and often in the face of more extreme stimuli or change (Balogun 2007; Brubakk and Wilkinson 1996b). In this study, the focus is on how agents in situ (Hotel General Managers) draw on culture in their day to day practice when implementing strategy and whether culture enables or restricts agency.

Having discussed how culture can be theorised as part of an agent's conjunctural or situational knowledge, it is important to understand how culture plays a role in the more general, transposable elements of internal structures. Firstly, it is useful to explicate how habitus or dispositions are culturally infused and then to reflect on their role in the structuration cycle. Habitus, as described earlier, results from socialisation over time, it encompasses values, beliefs about the world and is durable; the similarity to definitions of culture are clear. Habitus is embodied culture by another name<sup>7</sup>, institutionalised (Berger and Luckman (1966) over time, resulting from socialisation in childhood and later developed through "the evolving influence of the social milieu" (Wacquant 2008:267).

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<sup>7</sup> Similarities in constructs transcend disciplines, Anthropologists would call this culture.

Secondly, it is widely accepted that general dispositions or Habitus is ‘crucial’ to agency (Stones 2005; Moore and McPhail 2016; Coad and Herbert 2009), “it takes the *meeting* of disposition and position, the correspondence (or disjuncture) between mental structures and social structures, to generate practice” [emphasis in original source] (Wacquant 2008:269). Thus, a person’s background determines how they respond in given circumstances and provides a motivation for action. Importantly habitus is transsituational (Coad and Herbert 2009) but plays a key role in the interpretation of internal structures, in this way it is implicated in the cycle of structuration. Thus, agents bring these durable recipes from different domains or social systems (Whittington 1992) and they, often pre-reflexively, affect their day-to-day decisions and actions.

Culture is implicated in action, culture can be theorised as both an enabler and constrainer of action; culture can be viewed as a guide or the motivation for action. Earlier the role of ontological security was discussed, described as the unconscious need to generate feelings of trust and security (Giddens 1984). Agents will employ protective devices when required, what Goffman call maintaining face, the effective use of language and tact is central to this. Culture provides a stock of knowledge of how to cope in these circumstances (Berger and Luckmann 1966; Goffman 1959; Geertz 1983). Culture thus provides the rules and resources to enable action, these actions which will maintain routines and cultural protocols or breach them and thus will result in outcomes that perpetuate or change culture. Stones (2005) reflects on key elements of active agency that he considers important when investigating agents’ conduct. In addition to energy, Stones identifies elements of active agency shown in Box 3.1 below.

### Box 3.1 - Analytically distinguishable elements of active agency

- Shifting horizons of action
- Creativity, improvisation and innovation
- Degrees of critical distance and reflection
- Conscious and unconscious motivations
- Ordering of concerns or sorting out of priorities into a hierarchy of purposes. This may involve more or less critical reflection.

Source: Stones (2005:101)

In action, culture can be imbedded in practice, the flow of activity/action results in *praxis* (to draw on Jarzabkowski et al 2007), culture thus becomes praxis through the day to day actions of organisational members. Culture sways action, for example, providing incentives for improvisation should an organisational culture that value creativity, or with rituals and heroes linked to new product development, agents in context will be empowered to improvise. If the culture is more bureaucratic or risk adverse, then action may be less likely to involve improvisation because this is not sanctioned implicitly via culture. Ordering of priorities can be enabled or inhibited, for example Brubakk and Wilkinson (1996b) found different approaches to the customer, in terms of being proactive or reactive, in a changing cultural context following the merger of two retail banks. In addition, culture can operate as a control mechanism, an “exchange regulator” (Alvesson 2002) leading to compliance and continuity, perpetuating the social system and cultural norms. Alternatively, culture could act to enable action (Sydow 1998) such as in Adhikari and Jayasinghe’s (2017) study of government accounting practices. Culture is a structure as established above, structures are made concrete in action, in these moments of instantiation (Berger and Luckman 1966), thus becoming an outcome of the process.

This study is not a study of culture, but a study of practice (strategy as practice). In this study, culture is the context for action, it is the medium and the outcome of structuration. In the cycle of structuration, the outcome of actions is modified or maintained external structures (at Time 2), i.e. culture, amended, maintained or renewed, which in turn constitutes the external and internal structures at Time 1 for the following round of structuration (Stones 2005). If it is accepted (as discussed earlier) that culture is malleable or pliable (Archer 1985; Harris and Ogbanna 2002) then the outcome of any active agency can be to change the culture. It should be remembered however that this is only analytically separable, and the cycles of structuration are intertwined; any stage “can never

float free or be uprooted from the other parts of the structuration cycle (Stones 2005:86). It is proposed that through the focus on 'in-situ' empirical data analysis and the adoption of clear research steps (discussed in the next chapter) whilst focussing on the question at hand, it is possible to gain an empirical grasp of the complex structuration cycle.

In this way culture can be viewed as a modality of structuration process and although there is a risk that by choosing to focus on culture other factors may be obscured and that frame of reference you choose to use determines what you see! This approach has been theoretically constructed and justified as a useful and valid way to study strategic practice and any limitations that ensue will be duly noted and discussed in later sections of this thesis. The key is to select a frame of reference suitable, relevant and justified in the context of the question at hand. The research question in this study is; How do middle managers implement strategy through their day-to-day practice and what role does culture play in their agency? Utilising a culturally augmented version of Stones' SST will facilitate answering this question.

### **3.7 Summary and conclusion**

The conceptual underpinning for this study is Culture, which is fundamentally semiotic in nature (Geertz 1973), complex and ubiquitous. It can be conceived as a control mechanism, as an all-embracing *consensus gentium* (Geertz 1973), or as a collection of subcultures (Paoline 2004). Culture is fundamentally bound up with structure and agency (Hayes 1994), but within this debate Archer warns the risk of conflation (Archer 1985). Acknowledging that culture has the propensity to both enable and constrain the agency of managers and responding to Herepath's call to bridge the macro/micro gap, culture has been placed at the centre of this study within the arena of strategic practice and thus advancing our understanding of culture and agency in strategy as practice. The review of extant literature addressing organisational culture revealed a range of different paradigms and disciplinary domains. Drawing on Alvesson, to understand culture as a metaphor, culture is seen as manifest at different levels, it was also shown that culture is malleable. The work of Schein and Hofstede provide frameworks for dealing with what Martin refers to the 'esoterica of culture' (2002:65) whilst there is a risk of reductionism, these provide a framework to sensitise the researcher.

### Chapter 3

Through an exploration of structure, agency and Structuration Theory (ST), the constructs that are fundamental to this study have been expounded. The key dimensions of structuration (Legitimation, Signification and Domination) were explained and following a review of extant literature employing ST, a culturally imbued theory of structuration has been proposed for use in this study. Following the transdisciplinary aspirations of this thesis, a framework was developed that integrated culture (without it being lost or reified) into a model of agency, thus combining anthropological constructs and sociological theory in a novel way to form a culturally explicit SST. This built on the work of Stones and his SST to provide the theoretical framework for this study. Thus, demonstrating how the notion of culture can be integrated into SST to provide an empirically useful tool for understanding the agency of middle managers in the practice of strategy implementation. This theoretical framework will have the potential to make a theoretical and methodological contribution to knowledge and will be used in the design and analysis phases of the field work in this study explained in the next chapter.

## **Chapter 4 – Research Methodology**

### **4.1 Introduction**

In this chapter the constructionist position adopted by the researcher forms the backdrop for a critical evaluation and justification of the qualitative research methods used. The question at the heart of this research is: How do middle managers implement strategy through their day-to-day practice and what role does culture play in their agency. The project aims to explore the practice of strategic implementation, and the role and experience of middle managers in the continual production and reproduction of social systems in a complex multi-unit service organisation. To extend our understanding of strategic implementation in practice and to contribute our understanding of middle manager agency in the context of strategic change. The conceptual and substantive theories that inform this research underpinned the construction of a theoretical framework and the methodology adopted.

The material in this chapter is organized as follows: The ontological and epistemological foundations of this project are explained and their implications for research design and contribution made clear alongside the implications of the background and positionality of the researcher. In the context of research methods theory, the extant literature and the research question, the research strategy and methodology will be explained including the selection of the case organisation. Strong Structuration Theory (SST) will be presented as a research tool (addressing objective 4) and a full description and justification for the data collection methods will be explained. In good order the data analysis and presentation processes will be expounded, and the chapter concludes with a critical review of the research process and limitations.

### **4.2 Research philosophy and positioning**

In qualitative research it is widely accepted that it is important to understand the beliefs and theories about the world (the paradigm) that inform the research. Denzin and Lincoln (2011) assert that it is equally important to make these explicit and actively write about them in the presentation of research. Humphrey and Scapens accept that “empirical data and philosophical argument cannot provide objective answers” (1996:93) the consequence is that researchers must “be conscious of and prepared to debate and defend the

assumptions, beliefs and value of judgements we use.” (1996:93). That is why a clear and overt recognition of positionality is critical to interpretive research. Authors such as Collis and Hussey (2009) identify research paradigms on the continuum from polar extremes of positivism at one end to interpretivism at the other. But what is important, is to unpick the constituent elements of each perspective and understand its implications for the assumptions made about the nature of reality (ontology) and the associated acceptance of what constitutes valid knowledge (epistemology).

These constructs co-determine what might be considered to be appropriate methodologies and research methods for a given study (Anfara & Mertz 2006). Crotty (1998) sets ontology alongside epistemology as they are inextricably linked, discussing the nuanced and sometimes erroneous connection between ontology and epistemology, he provides the example of “[R]ealism (an ontology asserting that realities exist outside of the mind) is often taken to imply objectivism (an epistemological notion asserting that meaning exists in objects independently of any consciousness)” (Crotty 1998:10). This is a contentious and contested arena with many scholars disagreeing. A Realist ontology accepts that realities can exist outside of the conscious mind of beings, this is often assumed to imply an objective reality exists, but this fails to acknowledge that one person may see a table and think about a family meal, while another may see a table and develop anxiety associated with sitting examinations. This reveals that the relationship between ontology and epistemology is subjective and by no means simple or universally accepted. Lincoln and Guba (1985) list the axioms that embody a relativist position, this includes: -

- \* Realities are multiple, constructed and holistic.
- \* Knower and Known are interactive, inseparable.
- \* Only time-and context –bound working hypothesises (ideographic statements) are possible.
- \* All entities are in as state of mutual simultaneous shaping, so that it is impossible to distinguish cause from effects.
- \* Inquiry is value-bound. (Lincoln and Guba1985:30)

These dictums have implications for how researchers go about research, in all its phases, from design, selection and recruitment of participants to the data collection and analysis and the associated limitations. But importantly it has implications for the contribution that any single case study can make (De Loo and Lowe 2012; Simons 2009). It is acknowledged

that in this domain, “theories are inevitably small-scale, interpretive and highly contextual” (Otley 2003:324).

Humphrey and Scapens’ (1996) recognised the epistemological relationship between theory and practice. They called for a shift from managerialist’ approaches and normative theories to explanatory case study research. This same shift in emphasis occurred in strategy research with the ‘practice turn’ and the development of the SaP movement, as already described in chapter 2, mirroring a move to qualitative research (Ahrens and Chapman 2006; Jarzabkowski 2008; Seidl and Whittington 2014). In addition, Thomas and Linstead criticise the literature on middle management, observing that existing research is locked in a positivist epistemology, hampered by functionalist theorising “ascribing facticity to concepts that are socially constructed” (2002:73). These paradigm shifts and critiques in the extant literature justify the approach taken in this study. Flick (2014) argues that the research question should be considered front and centre, when determining the approach adopted, and that certain approaches are suitable for certain forms of inquiry or research questions. The question at hand concerns the socially constructed practices of managers in a sociocultural setting of a complex service organisation. In the light of this, it is apposite that this research is grounded in a social constructionist approach.

When considering Social Constructionism, it should be noted that it is recognized as a ‘broad church’ (Lock and Strong 2010) and there is considerable variation in the usage of this and other similar terms (Flick 2009). According to Crotty, constructivism

is the view that all knowledge, and therefore all meaningful reality as such, is contingent upon human practices, being constructed in, and out of, interaction between human beings and their world, and developed and transmitted within an essentially social context. (Crotty 1998:42).

Burgoyne in Thorpe and Holt (2008) acknowledges disciplinary preferences for the use of social constructionism (from sociology) and social constructivism (from psychology) and recognises the different emphasis given to objectivity and subjectivity by different academics. Berger and Luckman (1966) on the one hand, are more moderate accepting there is a reality out there, whereas Latour and Woolgar (1979) adopt a more extreme view

that “the whole world is nothing but a social construction” (Burgoyne 2008:64). Berger and Luckmann (1966) address the subjectivity and objectivity in their treatise on the social construction of reality, acknowledging a dialectical human process of meaning making, involving externalization, objectification and internalization, through these processes over time, the social world is constructed. Thus, “[S]ociety is a human product. Society is an objective reality. Man is a social product.” (Berger and Luckmann 1966:79).

Crotty warns against assuming unfettered subjectivity and individualism, in a socially constructed world, recognizing that the process of meaning making is historically grounded in institutions of meaning that ‘precede us’ (1998:52). These interpretive strategies or schemas, or symbolic systems as Geertz would call them, are in fact culture (Crotty 1998; Geertz 1973). This philosophical position is also consistent with Giddens’ and other social theorist whose ideas inform this study. Crotty (1998) states that whichever terminology is used, it is the distinction that is important between the view that, each of us has a completely unique experience (constructivism), and the acknowledgement that cultural influences can shape the way we see things (constructionism). Bearing in mind the centrality of the notion of culture in this research, it is axiomatic that the latter derivative is adopted, from here referred to as constructionism.

The researcher came to this ontological position through a critical and reflexive engagement with the extant literature, finding a natural affinity to interpretivist approaches, which aligned with the nature of the research question. As has been shown SaP literature emphasises the social in strategy, emphasising the interpretive practice of knowledgeable agents (Seidl and Whittington 2014) *and* structuration theory (and SST in particular) facilitates the acknowledgement of wider cultural influences on individual social construction of meaning. In addition, the key influential readings in the extant literature inhabit the same broad ontological and epistemological terrain, which further supported the adoption of a constructionist stance. It should also be recognized that the researcher, and hence this project, is influenced by the researcher’s background and

practice. Her upbringing in hospitality, her professional education and experience in management accounting and strategy, (which has already been explained in the introductory chapter) will influence the data collection and analysis. A background in hospitality practice and theory provides a knowledge of terminology, language and imperatives associated with the field context, for example, business models and formats in use, the key stakeholders likely to be influential in the field of position practice relations, the real time (simultaneous) nature of production and consumption, the importance of customers and performance KPIs such as RevPAR and GOPPAR<sup>1</sup>. This knowledge and sensitivity facilitates understanding for the researcher and gives them practical credibility with the participants. However, such knowledge can lead to preconceptions, so it is important to ‘stay open’ (Simons 2009) and demonstrate your own reflexivity as a researcher. The researcher must keep in mind at all times any assumptions she/he could be making. Although very familiar with the sector, the researcher has never been a GM in an international hotel chain, first-hand experiences of which could add deeply embedded to add bias to the research processes. Even so, measures were taken to avoid unconscious bias and ensure validity and credibility in the analysis which is essentially an interpretative act. These measures are addressed as each phase of the research design and implementation is described in the remainder of this chapter and key limitations (or limits) to the research are addressed in section 4.6.

### **4.3 Research strategy and methodological choices**

#### **4.3.1 Research strategy**

According to Stake, “[C]ase study is the study of the particularity and complexity of a single case” (1995: xi). This should be seen as a strategy or approach to research, rather than a method (Simons 2009). Stake also acknowledges that intent should drive the choice of case (1995:4).

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<sup>1</sup> RevPAR = Revenue per available room; GOPPAR = Gross operating profit per available room).

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An instrumental case study is the study of a case (e.g., person, specific group, occupation, department, organization) to provide insight into a particular issue, redraw generalizations, or build theory. In instrumental case research the case facilitates understanding of something else.

(Mills, Durepos and Wiebe 2010:61).

Bearing in mind the focus is on middle managers and Hotel GMs in particular and the purpose to understand how they implement strategy, it can be argued that qualitative case study research is appropriate to the research question. According to Crotty “social constructionism emphasises the hold our culture has on us: it shapes the way in which we see things (even the way in which we feel things!) and gives us a quite definite view of the world” (1998:58). A consequence of this philosophy, an inductive approach with rich qualitative data collection through a case study method has been employed. This makes it possible to shed light on the complex construction of meaning and multiple experiences, to understand complex social phenomena, that only exploratory fieldwork can reveal, thus a case study approach is most suitable (Frow, Marginson and Ogden 2005; Seale 1998; Simons 2009; Stake 1995).

A case study approach can be justified because this research seeks to “understand complex social phenomena” (Yin 2009:4)<sup>2</sup> in addition, exploratory field research is suitable when there is a dearth of extant literature and existing knowledge is incomplete (Frow, Marginson and Ogden 2005; Altinay and Paraskevas 2008). Eisenhardt draws on Glaser and Strauss (1967) to state, “it is the intimate connection with empirical reality that permits the development of a testable, relevant, and valid theory” (Eisenhardt 1989:532). Case study research is widely used in the fields of study that inform this research, in the research of middle managers, Wooldridge, Schmid & Floyd (2008) reviewed 25 years of middle management research, to reveal wide spread use of case studies. Vaara and Whittington’s (2012) review of wider SAP literature revealed a significant methodological reorientation in the strategy discipline, they report “a strong orientation toward various qualitative methods, often within a single organization” (2012:291). Within the SAP movement, a

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<sup>2</sup> It is recognized that Yin (as a post positivist) and Eisenhardt, may not be aligned with a social constructionist perspective, but they are recognized as an authoritative source in relation to case study methods, so are cited here.

strand of work utilizing Giddens is also characterized by qualitative research, carried out through case studies and ethnographies (Whittington 2011b).

The value of case study research is often understated in management and organizational journals and the predisposition of mainly US journals has resulted in a Cinderella syndrome for case studies in some quarters (Lee, Collier & Cullen 2007). Despite this, the case study remains the most appropriate methodology as it is philosophically aligned, provides in depth understanding of phenomena, contextually grounded and is widely used in the disciplines underpinning this study. A single case study organisation is utilised as this provides boundaries and limits on the variability of the complex factors that can play into the day to day lived experiences of middle managers. Case studies are “bounded by time and place” (Creswell 2013:97), by choosing one organisation, structural factors such as the social systems and regimes of accountability (embodied in the approach to strategic implementation and control) are stabilised and broad influences such as organisational culture normalized or rather bounded to some extent. Thus, facilitating the focus on the day-to-day reflexive practice of individual agents, in this case middle managers. Consequently here, “knowledge and practice are studied as *local* knowledge and practice”, thus cannot be observed or understood out of context (Geertz 1983 in Flick 2014:12).

Case study remains a broad and misused term in research (Czarniawska 2014), it is conceived by some as a research strategy, or a method (Yin 2009) or a unit of analysis (Miles and Huberman 1994). However, what matters for research that seeks depth and understanding, is to ensure the case study is clearly identified, bounded and its selection justified. This is also critical if the quality of the research is to be defended, a process that is imbued with philosophical prejudices and arguments (Balogun, Huff and Johnson 2003; Cassell et al 2006; Tracy 2010). The bounded nature of the purposes and possibilities of case study research must be recognized and will be discussed again, when critically reviewing the research process and its limitations.

### 4.3.2 Sampling and case study selection.

A single case organization has been selected with a series of embedded cases (Altinay and Paraskevas 2008; Flyvberg 2011; Simons 2002; Yin 2009), these instrumental cases are the middle managers embedded in this multi-unit service organization. Each unit of analysis, a single middle manager, provided data that was analysed to construct cross case themes, revealing how strategy is implemented in the case organization. This focus on the agent (middle manager) in the context of the organizational setting, requires a process of zooming in and out identified by Nicolini (2009) which is facilitated by Stones' composite research strategy (CRS) (this process will be described in detail shortly). The case studies have been chosen to address two types of case study enquiry.

The single case organisation was selected, adopting convenience sampling, to be an *instrumental* case (Stake 1995); "the case is chosen to gain insight or understanding into something else" (Simons 2009:21). In this research we are not interested in the actual strategy of the case company itself, but are focusing on the process, or rather the practice, of strategy implementation, i.e. the active agency of managers within the strategic context. In addition, the individual middle managers (selected utilising purposive sampling) can be conceived as part of a *collective* case (Stake 1995), here a few multiple cases are examined to construct a collective understanding of a particular issue or question (Simons 2009). The choice of a single case is suitable for the research question and arguably prefigured, to some extent, by the research paradigm, but such choice has implications. It is not possible to generalise from a single case, although this is not the aim. "The aim is particularization - to present the rich portrayal of a single setting to inform practice, establish the value of the case and/or add to knowledge of a specific topic." (Simons 2009:24).

Sampling is an important part of the research design process, often underplayed in qualitative research, but it has implications for the application of findings to other contexts.

Choices in research design should always be grounded firmly in the research question and the aims of the research. Researchers should acknowledge the consequences of these choices on the outcomes, limitations and impact of the research. The selection of the Hotel sector and the specific case organisation in this research were selected on the basis of convenience sampling, this has implications for the ability to generalise from the research. However, constructing generalisations is not an intended goal of this research for both philosophically and practical reasons, so this approach to sampling leads to an acceptable and expected limitation to this research project. The contribution from this research will be discussed in chapter 6, but it must be remembered that due to these design decisions, this research is limited to contextually grounded and small-scale theorizing. (De Loo and Lowe 2012; Otley 2003))

The middle managers selected in this study can be argued to typify middle managers in any large organisational setting, they align with general accepted definitions of middle managers and were recognised within this sector as critical to strategy implementation. The selection of GMs in this study therefore constitutes theoretical or purposive sampling, “[T]his means that the inquirer selects individuals and sites for study because they can purposefully inform an understanding of the research problem and central phenomenon in the study” (Creswell 2013:156).

The sector and field site were selected because they provide a rich and complex setting for research, in a sector that is both economically important and changing under the pressures of global competitive forces. As mentioned, the case company was identified primarily using convenience sampling, which, according to Patton (2002), is an approach that is “encompassed under a broad term ‘purposeful (purposive) sampling’” (Altinay, Paraskevas and SooCheng 2016:101). For this research, it has theoretical (purposive) sampling benefits (Flick 2009; Frow, Marginson and Ogden 2005) due to its value as a complex international hotel chain with well-developed management and strategic controls. The case company is an international multi-brand hotel company with European head office (it will be referred to as HotelGroup throughout the remainder of this thesis to maintain anonymity). It is also convenient because access has previously been successfully achieved by doctoral researchers.

## Chapter 4

Public domain information reveals that HotelGroup has experienced rapid growth over the past 15 years<sup>3</sup>, following key strategic initiatives for expansion including the exploitation of an asset light strategy (explained in chapter 2 section 2.5.1). It is also known for its unique culture, high levels of innovation and prominent espoused values, and thus provides a suitable arena for this inductive study. Like all international hotel companies, HotelGroup operates a series of different brands with the stratified sector aligned to star ratings, here however, the focus is on one upscale brand in the HotelGroup which will be referred to as HotelCo. The case company has intrinsic value as an instrumental case, so is theoretically valid and the focus on a single brand reduces extraneous factor in the strategic context to facilitate this practice research. In addition, access was facilitated by previous contacts at a UK university, the company have allowed previous PhD candidates to conduct research in the company. Not only is it important to understand why the case company was selected, but also why GMs were chosen as the focus.

The role of GMs and their position as middle managers has been critically reviewed and firmly established in Chapter 2. They are acknowledged as the leaders of independent business units within a larger organisational structure and as such are at the nexus of strategic implementation (Atkinson 2006; Roper 2018). This is what makes an understanding of their practice and praxis valid and important (Jarzabkowski, Balogun and Seidl 2007). For General Managers, at the conjuncture of customers, commerce and colleagues, the problem of agency is made manifest. GMs therefore are actors engaged in a perpetual process of balancing tensions and demands on resources of all kinds, with pressures from above, from their senior managers, pressures from customers and subordinate staff. They are key strategic ‘actors’ at the center of strategy implementation, therefore are justifiably the subjects in this research. Therefore, they were selected using a theoretical (purposive) sampling approach. All GMs within the HotelCo brand were invited, with the exception of two units which were excluded by the gatekeeper, one because it was in administration and the other was a troubled franchise unit. The exclusion of these units means this is not a total population of GMs, and the sample does not reflect fully all the business model variations in the sector, but this is not a randomised study

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<sup>3</sup> A more detailed profile of HotelGroup will be provided in the findings and analysis chapter.

seeking to generalise from a representative sample, so this will not affect the quality, reliability or validity of the findings.

It should be noted that other methods of data collection were considered but discounted as less appropriate. For example, questionnaires, Schein (2004) states that questionnaires are considered unsuitable for research into culture because “the patterning of cultural assumptions into a paradigm cannot be revealed by a questionnaire” (2002:206). This may appear contradictory to the light of Geert Hofstede’s influential work which used questionnaires (including data from existing questionnaires), sometimes in combination with in depth interviews to study cross-national cultures and organisational cultures in global industries (Hofstede 1983; Hofstede, Nueijen et al 1990). Not only is there a risk of reductionism with such methods (Baskerville 2003; Harrison and McKinnon 1999), they are not suitable to answer the research question here. Whereas Hofstede (1983) wished to reveal broad themes, construct a model at an institutional level to reveal the shape (in his words *gestalt*) of social systems, this research is interested in the micro practices and lived experiences of managers.

### 4.3.3 Strong Structuration Theory (SST) as research tool

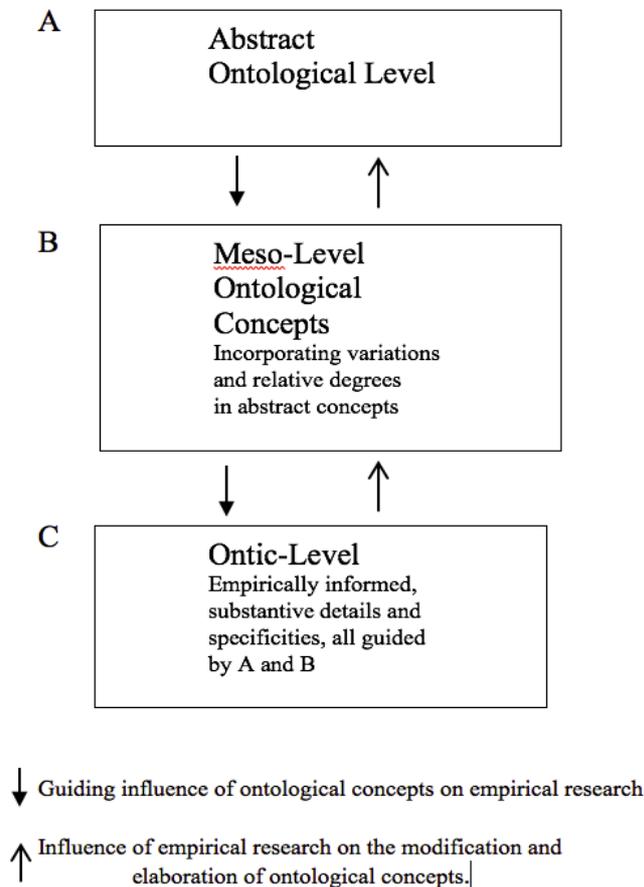
In addition to providing the basis for a central theoretical framework, Stones’ SST also provides a charter for the empirical activity of data collection and analysis. SST is deemed particularly suitable to case-study by several researchers in management control and strategy (Jack and Kholeif 2007; Coad and Herbert 2009 Feeney and Pierce 2016; Elbasha and Wright 2017). SST can be used in fact, it is suggested by Stones himself that, it *should* be used to provide a “bridge between the ontological concepts and empirical evidence” (Stones and Jack 2016:1147). Stones asserts that there is a dearth of literature on the relationship between ontological concepts and the technical aspects of research methods, such as interviews surveys and observation. This lacuna requires attention (Stones 2015) and along with other research in this nascent area (presented in chapter 3), this research makes a contribution to our understanding, by utilising SST in the design *and* implementation of empirical research. Stones’ Conceptual Methodology, first explained in

2005 and later developed in 2015, provides clear methodological steps (Stones 2005; Stones 2015; Stones and Jacks 2016). In the context of the research purpose or question at hand, Stones advocates drawing on suitable constructs, such as norms, power, meaning, time and space, values or resistance, and elucidating the relationship between these and the empirical data to characterise the ebb and flow of day to day practice.

Importantly, Stones claims that SST is ‘ecumenical’ (Stones and Jack 2016:1147) and can be combined with other theories as necessary to address the question at hand. It is argued that in this way SST is an epistemological and theoretical framework “that incorporates the wider macro-structural level yet enables the focus to be sifted to the micro level to understand how individual managers enactment might reproduce, reinforce or transform that macro structures” (Thomas and Linstead 2002:73). This study of the practice of strategy implementation, draws on ontological notions of actors and agency, in particular autonomy and discretion, meaning making through a focus on organisational culture and power through understanding accountability and control. Utilizing SST to connect the macro forces of strategic control and structures and the micro agency of middle managers.

Stones advocates three techniques in his conceptual methodology; Actors’ Context Analysis, Actors Conduct Analysis and the Ontological-Ontic sliding scale. These first two are key methodological brackets, are different to Giddens because they are anchored in the concrete experiences ‘in-situ’ and thus are less abstract (Stones 2005; 2015). This form of bracketing assists the researcher to find focus. Actor’s context analysis (which is also called strategic context analysis) refers to the researchers’ attempts to gain insight into the actor’s hermeneutic interpretation of their own situation. This analysis points outwards from the agent-in-focus to the relevant external structures in the strategic terrain (including the network of practice relations and the extent to which structures and other agents impinge or provide constraint on action). Actor’s conduct analysis focuses inwards to the agent’s internal structures, to elucidate their dispositional frame, how they prioritise, their motives and desires, ordering of concerns and hierarchy of purpose (Feeney and Pierce 2016). The ontological sliding scale enables the researcher to link abstract concepts (for example the knowledgeability of actors) to examples from empirical evidence and develop meso-level articulation of these to develop or to define categories of knowledgeability arising in different contexts. This provides transposable meso-level ontological constructs that can be used later in the same study or in other studies.

Figure 4.1 - Stones' Three abstract-concrete levels of ontology.



Source: Stones (2005:77)

The sliding ontological scale enables the researcher to consider different kinds of knowledge, at different levels of abstraction within the agents' contextual frame. At each level there are a plethora of relevant concepts, relating to power, understandings and norms (Stones 2016). In this study these levels have been exposed through the rich description of strategic context and strategic conduct.

These three devises lead to the steps in analytical processes described later. The research design combined conceptual methodology with technical methodology (i.e. normative research methods theory) to determine the data collection methods which will be described in the next section.

#### 4.4 Data collection Methods

As already explained a constructionist paradigm has been adopted. This predisposes researchers to “(U)se inductive method of emergent ideas ... obtained through methods such as interviewing, observing and analysis of texts.” (Creswell 2013:36). Consequently, a range of qualitative data collection techniques were employed, and a range of data sources utilized (Miles and Huberman 1994) formed of public domain information, company annual reports and press releases, company documentation provided to the researcher, interview testimony and personal reflective logs from participants. Using multiple sources of data, adds reliability to what is often considered to be a subjective and thus less scientific approach (Flick 2014).

##### 4.4.1 Primary data collection – design and implementation

Data collection has been carried out within the case company using multiple data sources, including documentation, interviews, and diaries, in addition observations during field visits and physical artefacts were captured in field notes where appropriate. The preparatory work and initial conversations with the gatekeeper, revealed key ‘moments’ of accountability and key control events constituted by monthly review meetings and regular conversations, where the managers are held accountable for the performance of their units and have to mediate strategy implementation. In addition, the GM role is highly operational, involving multiple agents and is temporally unpredictable. These regular meetings or events can be seen as, key arenas of strategic control (or, drawing on Bourdieu’s notion of ‘Field’), typified as *battlefields* (Wacquant 2008) and the important discourses in which the dialectical processes of ongoing production and reproduction of strategic implementation and control occur.

The choice of data collection techniques was thus influenced by the nature of the spatial, temporal and contextual factors specific to the case company and the agents-in-focus. These strategy implementation ‘events’ (conversations; regular meetings etc.) have an unpredictable temporal quality i.e. exact timing and duration varies and cannot be pre-planned for research purposes. In addition, there are commercial sensitivities to consider, financial information is private and dynamics in meetings are dependent on unit status (i.e.

whether leased or managed<sup>4</sup>). The nature of the meetings and events would make negotiating access very difficult (Ritchie and Riley 2004). All these factors make access by an outsider difficult (Ahrens and Chapman 2006; Okumus, Altinay & Roper 2007). Therefore, in addition to face-to-face semi-structured interviews, it was decided to use participant diaries, or reflective logs, to record the social interactions and the decision making that takes place.

Self-reported diaries, provided a solution to the challenges of access and were a key part of the research design. Diaries are a proven method of data collection however, they are rarely used in management research, to date the situation remains that “there is little written guidance for their use” (Balogun, Huff and Johnson 2003:208). They have been used in a range of research settings where the data and/or the subject matter is sensitive (Hoppe et al 2000) and to augment other data collection techniques (Clarke et al 2009; Elliott & Jankel-Elliott 2003). It is acknowledged that “[P]articipant diaries are an excellent source of data that has not been given sufficient attention” (Jacelon & Imperio 2005:991). Albeit participant generated, diaries allow the researcher to gain access to otherwise inaccessible moments of strategic implementation. This combination of face-to-face semi-structured interviews and self-reported participant diaries (reflective logs) were used to gather the detailed descriptions of the preparation, enactment and reflection on the strategic implementation processes. This, by design, facilitated analysis of both context and conduct analysis (Stones 2015).

Interviews are a widely used data collection technique, discussed in all research methods reference books. Collis and Hussey acknowledge that they are used differently with different paradigms, can be individual or group, structured or unstructured (2009). Kvale and Brinkmann (2009) discuss the fundamental value of, and difficulty associated with, interviewing; they view it as a craft and a social practice, which requires experience and careful consideration of ethics. They ask a simple question “if you want to know how people understand their world and their lives, why not talk to them” (Kvale and Brinkmann 2009:xvii). Interviews should have structure and purpose and require careful questioning and listening skills; the “purpose of most qualitative interviewing is to derive

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<sup>4</sup> Hotel management contracts result in some units being leased and other managed, this changes the accountability of GMs and results in different pressures on action and stakeholders being present at review meetings.

interpretations, not facts or laws” (Warren 2002:83) but they also serve to provide descriptions (Stake 1995). The key considerations when designing and carrying out interviews are; gaining access, building a rapport with the interviewee, building trust, focusing on the question at hand, active listening, maintaining a record or managing and processing the resultant data. Each element has critical philosophical, practical and ethical dimensions that require careful planning (Roulston 2010; Simons 2009; Stake 1995; Warren 2002).

In a constructionist paradigm, whether structured, semi-structured or free flowing, interviews are, to a lesser or greater extent, co-constructed (Roulston 2010), even with standard protocols each moment/interchange is unique and a product of the interpretive schemas of both the interviewee and interviewer. With verbal data, how things are said, the tonal and contextual setting for words and phrases, is as important as the words and phrases themselves (Flick 2014). So, to facilitate effective interviewing, researchers require careful choice of language, understanding of technical, parochial and cultural language (Stake 1995) when constructing and presenting questions to interviewees. In addition, showing empathy, being alert to potential misunderstanding and then probing for more depth and detail in answers. This probing is an important aspect of effective interviewing (Flick 2014; Roulston 2010; Warren 2002). “Probes frequently use the *participant’s own words* to generate questions that elicit further description” (Roulston 2010:13 emphasis in original), in addition, the researcher adopted the ‘5 Whys’<sup>5</sup> practice where necessary, often to clarify or verify the data, and the interviewer would ask for examples.

A semi-structured interview instrument (including open questions) was developed covering substantive topics and questions derived from the themes and issues that were revealed in the literature review (Flick 2014). In addition, constructs drawn from Stones’ quadripartite framework (Stones 2005) were blended into a schedule of questions that was designed to address the research question. When trying to understand the practice of middle managers in strategy implementation, key themes emerging from the extant literature were unsurprisingly; Strategy, Culture and Control, which provides a meta-

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<sup>5</sup> Repeating the question ‘why’ up to five times elicits deeper levels of reflection and explanation from participants.

## Chapter 4

structure for the interviews. These themes map onto the notions of external and internal structures and active agency. The interview schedule, included in exhibit 4.1, demonstrates the phases of the interview, the key themes and their relationship to the Quadrapartite framework.

The interviews were face to face and carried out in the GM's own unit. In the preparation for the interviews, the researcher suggested to participants that these take place in a private quiet environment. This was so that the space and place for the interviews would facilitate cordial and candid conversation. The life history approach (Ladkin 1999b) in the first part of the interview, started to explore and expose the agent's general dispositional frames, the following phase focussed on the three themes whilst exploring external structure and the agent's contextual knowledge (Stones 2005). An open question at the end encouraged other facets to emerge, providing a reflective opportunity and draw out instant reactions from agents immediately accessible knowledge (Flick 2014). The combined use of an interview schedule, careful planning and reflection by the researcher, are mechanisms for reducing the risk of bias creeping into the interview process. Interviewer bias can emanate from the tone of voice and non-verbal cues that could influence the respondent to reply in a particular manner. Interview participants may try to impress or please their interviewer (Alvesson 2003; De Loo & Lowe 2012) or may withhold full information due to concerns about loss of face or confidentiality (Saunders et al 2009).

Chapter 4

Exhibit 4.1 Interview Schedule for General Managers

| <b>Schedule for GM interview and diary training</b>    |  |  |
|--|--|--|
| Intro  | <p><b>Who am I</b> (steeped in hospitality, “born in a hotel” hoteliers as parents done every job in tourist hotel. Family, Education, Qualification and Professional teaching role all my life. Also Professional qualification ACMA. and <b>what’s the research</b>, <b>Your part in the research</b> – explain interview followed by diary of events and meetings</p> <p><b>Structure for today</b> – Interview, initial data followed by training and instructions for the diary keeping. Check Time available and Audio Recording</p>   | Ethics, research process, validity<br>UoBGovernce<br><b>NDA</b> Data handling  |
| About you and GM role                                  | <p><b>Warm up</b> – How Business? Or What’s business like? Recession, recovery? Business mix of this unit?</p> <p><b>Tell me about yourself</b> - Your career background, progression, previous roles and jobs and what you like about the role. <b>“How did you come to be here in Hotel Group as GM?”</b></p> <p>What’s <b>important</b> to you in your work and life more generally, major professional influences (people or events).<br/>Your role as GM – how would you describe your role as GM</p>   | Stones 2005 Quadripartite framework - General Dispositions, Habitus<br><br>Position Practices                                |
| GM understanding of external structures and influences | <p><b>Strategy</b> -What do you understand about HotelGroup’s strategic intent and strategic priorities? - Has this changed over time? Publicised 4 D strategy and implementation of this? What’s it like inside? Or is that for investors?</p> <p><b>Culture</b> - How would you describe the culture here?<br/>i) In the Unit, ii) In the Brand? iii) In the Company?<br/>What facets of culture do you think are most influential or important – Has this changed over time?</p> <p><b>Control</b> - What matters round here? What are you held <b>accountable</b> for? What are the main control mechanisms/systems from your perspective? Are things controlled tightly or loosely? Has this changed over time?</p> | Stones 2005 Quadripartite framework - CSKoES<br><br>Examples? Probe - Why, What, When, How and Who<br><br>Five Whys, pause!! |
| <b>Open question</b>                                   | <p>Is there anything else you think would be interesting for me know at this stage?<br/>Thank you – now I’d like to talk you through the diaries.</p>  |  |
| Diary Briefing   | <ol style="list-style-type: none"> <li>1) Explain diary keeping with reference to Mgrs briefing – talk about explore the sorts of events that may be reflected upon and how many. Verbal diaries preferred.</li> <li>2) Discuss what to record, reference to Research Briefing for Managers and Share prompt sheet -</li> <li>3) Agree phone or Dictaphone, dragon dictate or equivalent or if written email method</li> <li>4) Agree set up communications – MP3 files or typed diary; Drop Box or email</li> <li>5) I’ll check via email on a regular basis</li> <li>6) Agree the time period two months –December and the February (break to reflect and see if right level of detail is emerging)</li> </ol>         | Stones 2005 Quadripartite framework – Diaries will capture <b>ACTIONS</b> and agency   |
| Close /End   | <p><b>Key issues</b> – Confidentiality, anonymity, withdrawal<br/>Technical Issues – tape recorder and notes for today - forms &amp; agreements sign before finish.<br/>SIGN Participant Information Sheets<br/>THANK YOU for your time now and future commitment.</p>   | Ethics Forms   |

In addition to ethical approval through the university's processes, a non-disclosure agreement (NDA) was a key part in keeping confidentiality and anonymity. In addition, in this small company, it would be easy to reveal who else is participating in the study and reveal other GM's opinions and information. Therefore, when conducting the face to face interviews, the researcher was very careful not to reveal where she had visited or who she had spoken to. Importantly the researcher invested considerable time preparing for the field (Chughtai & Myers 2016), this involved detailed profiling of all the hotel units where respondent GMs were based. Developing a familiarity with the estate and a critical to understanding the external and internal environment helped the researcher develop map of the strategic terrain of the agent in focus. Whilst being cautious of not prejudicing the researcher and pre-analysing the company's strategy, culture and controls, such groundwork arguably assisted the researcher in preparation for "acknowledging the social processes and local conditions surrounding them" (De Loo and Lowe 2012:7). This preparatory effort combined with the researcher's experience working, researching and teaching hotel management, was important to gain a familiarity to reduce the drawbacks of an etic<sup>6</sup> perspective (Martin 2002) and facilitated more empathetic relationships in the field.

In line with good research practice, reflective notes were made during the field work interviews, this was completed as soon as possible after the interviews. These intuitively followed a similar structure to that proposed by Miles and Huberman reflecting on rapport, meaning "what the informant was really saying" (1994:66), reflecting on interview questions reaction to remarks, clarification of any significant contemporary factors (Miles and Huberman 1994). De loo and Lowe (2012) emphasise the role of reflexivity in the interpretative processes associated with qualitative interviews, advocating a recognising of multiple perspectives, which should be employed during the data collection and data analysis process.

Example of researcher's interview reflection - research audio memo.

Reflection on interview with xxxx xxxxxx: - Very forthright man, educated at boarding school, expat background, been all around the world as Executive Chef, moved into GM and Operations in Russia, then moved to UK. This is first GM role, very pragmatic, very well organised, unintellectual, unreflective, so this will be good for him, .....but very intelligent.

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<sup>6</sup> Etic = the perspective of an observer or outsider.

Doesn't suffer fools gladly, doesn't forgive (his words). Lives in some distance away, tearing off to [home town] now, he wasn't sure of the time of our meeting, squeezed me in, should have been picking up the children from school and now he is on the motorway with a long journey at rush hour, so quite a commitment to me.

He doesn't get culture, quite cagey at times wouldn't tell me about things, at times, not sure why. I'm hoping I'll get good open information, but he seemed the least attuned to what I wanted to achieve, quite cagey, didn't get culture, much more a political person than the others, different views, similar themes but didn't mention decentralisation or centralisation, didn't have problem with revenue management.

(Researcher's temporal reflective audio notes)

In addition to note taking, as recommended by Czarniawska (2014), the interviews were audio recorded to create a "rigorous and thorough 'orthographic' transcript – a verbatim account of all verbal (and sometimes nonverbal – e.g. coughs) utterances" (Braun and Clarke 2006:88). The researcher kept detailed notes of the content of discussions, on which emphasis and observations were also be added at key moments, these annotations made reference to non-audible cues and facial expressions and hand gestures and interviewers instant temporal reflections/observations. All interviews were transcribed and then double checked by over listening and amending, or clarifying, text where necessary with reference to researchers notes, thus improving the reliability and validity of the transcripts themselves (Kvale and Brinkmann 2009). This resulted in a full and accurate verbatim record of each interview which could be analysed when researcher returned from the field. These mechanisms and practices helped to mitigate against any interview bias that could arise from working as a lone researcher.

For a period of eight weeks following initial interviews, participants were asked to complete a reflective log or diary of key meetings that occurred in their day to day practice. Balogun and Johnson (2004) have used diaries as a primary data collection technique, drawing on Denzin (1989) and Taylor and Bogdan (1984), they state that,

(A)lthough data collection through diaries has a variety of strengths and weaknesses (Balogun, Huff and Johnson, 2003) a key strength is that they provide an insider's account of the situation (Burgess, 1984) and can be used to track what participants do in the absence of the researcher (Perlow, 1997, 1999). (Balogun and Johnson 2004:526).

The use of diaries is increasingly popular amongst social science researchers (Czarniawska (2014) and has been especially facilitated in the digital era. For example, Jones and Wooley (2014) used email diaries to explore attitudes of commuters to the London 2012 Olympics,

they used clear questions to standardise responses. Patterson argued that qualitative diaries provide “an innovative way to capture rich insights into processes, relationships’ settings” (Patterson 2005:142) and offers a framework for the analysis and interpretation of embedded diary narratives (Patterson 2005). Bolger et al (2003) provide a comprehensive review of the use of diaries in Psychological research, they identify several challenges including the need for training and clear protocols, level of participant commitment, which can be mitigated by keeping the diary requirement limited (see mitigation below). Yet these are still not widely used in management research. The use of diaries responds to the call from Balogun, Huff and Johnson to adopt paradigmatically plural research methods that are suitable for today’s highly diversified, multinational organisational settings including self-reporting methods, particularly diaries (2003). The use of diaries was an important and notable element of the research design.

The design and implementation of the diary process addressed many issues. To reduce the burden and to empower participants, they were given a choice of written or audio logs/diaries. The researcher felt it was important to offer participants the choice of method to suit their preferences. This is also in line with ethical principle identified by Murphy and Dingwall, who state, “autonomy or self-determination – research participants’ values and decisions should be respected” (Murphy and Dingwall 2001:339). All participants opted for audio and were given a small device, although over time several changed to using their own phones to record their reflections. Later recruits were primarily offered the choice to use their phones, as feedback from participants showed this to be the most convenient method. Twelve to twenty diary logs were requested from managers, this was a speculative range and a balancing act. Because respondents were busy middle managers, there was a need to limit the commitment and an ethical need to not over burden the participants, but also a desire to ensure sufficient data was collected to facilitate data saturation (Ahrens and Chapman 2004; Flick 2014).

To enhance reliability and validity, participants were given a structured prompt sheet (Jacelon & Imperio 2005) the one side A 4 briefing/guidance sheet (is shown in exhibit 4.2). In addition, all participants were issued with a pocket-sized diary prompt in business card style which would fit in their phone cover or jacket pocket. In addition, the researcher kept in contact with managers, on a regular basis via email, to encourage discipline in diary making and to address any difficulties. Combined with regular temporal review of

uploaded files, the researcher was able to provide feedback to participants which improved the level of consistency of data and, importantly, motivated them to continue, which is a key issue experienced by researchers using diaries (Day and Thatcher 2009; Jones and Woolley 2014).

Other challenges of using diaries include what Bolger et al, refer to 'reactance', which is a "change on the participants' experience or behaviour as a result of participation" (2003:592). In this project such processes only enhance the quality of the data, with the potential to bring concepts and constructs from the within practical consciousness (Stones 2005) into discursive consciousness (a key concept for Giddens 1984: xxiii). Bias can be introduced into this process, so to avoid leading the participants, they were not told which meetings to reflect upon. As autonomous professionals, they may manage their units in very different ways and so to be specific about which meetings should be a focus, could skew the data introducing a type of interviewer bias (outside of the interview environment) (Roulston 2010).

It should be noted that in addition to the key data sources of interviews and reflective logs, the research also utilized a variety of corporate data, documentation and information available in the public domain. This company is a public limited company registered on a European stock market and so provides an array of externally orientated information including, annual and quarterly reports, rich web site, and web casts, and internally orientated but publicly available magazines, video and briefings. These have been accessed and evaluated over a period of the research, to augment other data sources to help build an understanding of the strategic intent, to provide indications and evidence of the espoused culture and values and to familiarise the researcher (inevitably, an outsider) with the case company.

Exhibit 4.2 Guidance for Managers

University of Brighton Research



**Reflective Log/Diary - Prompt Card**

- 1) **Date and time** of meeting/discussions, **who** was in attendance/involved.
- 2) The **purpose and the context**, or background, to meeting or conversation.
- 3) **What was discussed**, what **decisions** were made, what were the **outcomes**?
- 4) What was the atmosphere and the **tone of interactions**; did it match your **expectations**?
- 5) **Why** do you think it went this way? To **what** extent did you draw upon your **values** and previous **experience**? Please provide details.
- 6) In **reflection**, what were the choices, would you have done anything **differently** and if so why?

**Recording device instructions**

- **Turn on** using the small switch on the end next to the headphone port
- **Red light** will glow on the side of the device between the + and – symbols
- When red light **flashes 3 times recording will start**.
- When finished recording, simply **turn off device using switch** on end.
- To access audio files **remove cap and plug device into USB** port.
- To **charge device**, plug into USB port on computer, red light will glow when charging, when fully charged light will turn off

**Uploading Data and file name protocol**

- Device will produce a **WMA file** (NB please ignore automatic file date, this is likely to be incorrect, we have been unable to pre-programme devices to current date and time)
- **Upload** into the shared drop box folder, which should display on your computer.
- Please up load your files as soon as possible after recording
- **Name the files** with your name (or the Unit name) and the date (e.g.HelenDec1st or BrightonDec1st)
- If you make two recordings in one day, ad the time (e.g.HelenDec1st13.00)
- I will check the box and retrieve files **each week**, and then empty the folder
- If you take **annual leave** during the period, please let me know (via email), then I will not expect files to be uploaded.

**Reminder/ recap of research themes and focus**

The research is concerned with **strategy implementation** and the **day to day practice** of **control and accountability**. I am interested in the routine and non-routine decision making of managers and **the tacit knowledge and experience** associated with the role of General Manager you. For example prioritisation decisions, allocation of resources, adapting to unexpected events and dealing with problems that arise.

- 1) the level of **autonomy and discretion** you have in particular circumstances;
- 2) the role of **organisational culture** and institutionalisation (put more simply “the way things are done round here”) and
- 3) your **relationships** with the hotel team and Head Office and Regional Staff.

Contact Helen Atkinson on [H.C.Atkinson@brighton.ac.uk](mailto:H.C.Atkinson@brighton.ac.uk) with any queries.

### 4.4.2 Access, recruitment and ethics

Gaining access to any research site can be difficult, and yet this is a topic that is often overlooked or downplayed in research methods literature (Okumus, Altiney and Roper 2007). Gaining access should not be taken as a simple activity as it “involves some combination of strategic planning, hard work, and dumb luck.” (Van Maanen and Kolb 1985:11). In this case the researcher gained access based on the long-standing relationship between the company and a UK university (as mentioned in section 4.3.2), then formal access (Laurila 1997) was negotiated with regional vice president. Convincing this ‘gatekeeper’ of the efficacy and value of the research was crucial to gaining access. This gatekeeper was crucial to the recruitment of participants and due to the size and structure of this company a great care was taken in this process (see purposive sampling in section 4.3.2). The initial meeting addressed issues of anonymity and how to protect participants and the company from any corporate risk, a non-disclosure agreement was drawn up by the researcher and the organisational gate keeper.

Ethically, it is important to consider the welfare of participants by judging the risks and benefits of involvement (Flick 2014). Non-maleficence and beneficence are important principles in ethical theory, in accordance with Bell and Bryman (2007), participants benefit from reflecting on their own experience and learning more about the research project through discussions during the interviews. At the other end of the spectrum, Simons (2009) states that “doing no harm” (p96) is the fundamental principle for research regardless of methodology. No discomfort or inconvenience is expected for participants and there are no risks from being involved. Although there can always be unintended consequences of action (Giddens 1984) research methods theory calls for sensitivity and awareness from the researcher in both data collection, analysis and presentation (Collis and Hussey 2009; Flick 2014; Simons 2009). It should be noted that these are not vulnerable people and they were not be asked to reveal or reflect on sensitive topics of a personal or traumatic nature, thus it is believed that this research constitutes low, or no risk, to participants

The method of recruitment is central to the ethical considerations of this project. It is important that participants are recruited without coercion or undue pressure. Free and voluntary engagement is likely to reduce potential bias and increase validity. At the

forefront of the researcher's considerations is the risk that the hegemonic power of head office and regional control will exert undue influence on the research process. Therefore, the researcher recruited GMs directly and independently via email correspondence, (the wording for this email was agreed with the gatekeeper). However, it was necessary for a senior manager of the organisation to introduce the researcher and the research project to the GMs and to explain that the company has allowed the research to take place, the wording of this separate email has also been negotiated and agreed with the gatekeeper. The wording of the two emails is shown in appendix 1. There was no pressure to participate and lack of participation carried no sanction. Participants were asked to give their informed consent following a clear explanation of the project and their role in it (see participant information sheet and consent form - appendix 2) signed copies of these forms were retained by the participant and the researcher alike<sup>7</sup>.

It is also crucial that the organisation, which forms the case study, does not suffer harm as a result of the research. Such harm could derive from disclosure of confidential information, to prevent this a confidentiality agreement (NDA) has been signed between the key gatekeeper in the organisation and the researcher. This agreement was developed in collaboration with the company and the Head of Contracts and Intellectual Property for the University of Brighton, in addition measures to maintain data security and anonymity are employed as outlined later in this paper.

The right to confidentiality and anonymity is a key element of the ASA's ethical guidelines 2011<sup>8</sup>, this was assured in this project through a variety of mechanisms and protocols. In addition to care in recruiting participants and during field work mentioned above, all participants privacy was be maintained, statements made in the interview were be attributed to a pseudonym or code name, so as to maintain individual anonymity during all processes of research including data storage, analysis and dissemination. When writing the thesis, and in any subsequent publication, pseudonyms were be used, and care was be taken not to reveal individual identity through contextual and rich details that are an expected aspect of a study of this nature.

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<sup>7</sup> Research methods, access arrangements and instruments were reviewed and approved by University's Ethics committee.

<sup>8</sup> ASA = Association of Social Anthropologists of the UK and the Commonwealth

## 4.4.3 Participants and data set.

With due diligence and careful design (as described above) the interviews were carried out and reflective diaries initiated, the resultant data set comprised of over 1,540 minutes of verbal data captured in 628 pages of verbatim transcripts and research notes. The data collected was generated from ten participants (two senior managers and eight unit general managers) and includes interviews with all eight GMs and reflective logs from six out of eight GM participants (See table 4.1). As part of this, three interviews were conducted with senior managers, two with Robert (pseudonym) the Area Vice President and one with Marlon (pseudonym) the Regional Director. The purpose of these interviews was very different to the GM interviews who are the target or subjects of this research. These interviews with senior managers were primarily to gain access and support for the research, but also to gather information about the espoused strategy of HotelGroup from the perspective of the regional managers. This complemented the public domain information and provided more detailed information about the motives and direction of strategic change in HotelCo. This provided triangulation (Stake 1995) and detail of the strategic initiatives in play in HotelCo at the time the research was conducted. This data was utilised to build a picture of the strategic terrain and is mainly reported along with GM testimony in section 5.2.

Table 4.1 Summary details of interviews and diary logs data by participant.

| Pseudonym | Role | Place      | Date of Interview | Mins | Logs No. | Logs Mins | Logs Start | Logs Stop |
|-----------|------|------------|-------------------|------|----------|-----------|------------|-----------|
| Graham    | GM   | Cardiff    | 22/05/2015        | 86   | 18       | 185       | Jul-15     | Aug-15    |
| Gordon    | GM   | Bristol    | 21/11/2014        | 93   | 17       | 285       | Dec-14     | Jul-15    |
| Jeff      | GM   | Manchester | 28/11/2014        | 87   | 6        | 136       | Feb-15     | Jul-15    |
| Nigel     | GM   | Stansted   | 28/11/2014        | 87   | 12       | 52        | Jan-15     | Jul-15    |
| Neville   | GM   | Durham     | 30/01/2015        | 94   | 4        | 33        | May-15     | May-15    |
| Grant     | GM   | Edinburgh  | 20/11/2014        | 87   | 9        | 27        | Dec-14     | Jan-15    |
|           |      |            |                   | 534  | 66       | 718       |            |           |
| David     | AGM  | Glasgow    | 08/01/2015        | 62   |          |           |            |           |
| Frieda    | GM   | Birm       | 21/11/2014        | 87   |          |           |            |           |
|           |      |            | GMs Total         | 683  |          |           |            |           |

GM = General Manager  
AGM = Acting GM

(Source: Field notes Summary)

In addition, a range of documentation was accessed from the public domain and the company. The main data was collected in the period between September 2014 and August 2015. Interviews lasted approximately an hour and a half and followed the protocols described above yielding detailed and rich data sets. In addition, over 60 diary logs were submitted, these varied in length from 5 minutes to 14 minutes (overview details of the logs submitted is included in table 4.1). Some participants were very focussed and provided targeted and short logs, other provided long more reflective audios. One of the GMs, Gordon, was unique in that he did not like using the audio and after several conversations, he agreed to a weekly phone call where the researcher would ask the prompt questions in a conversational style. In addition, Jeff who was initially good at keeping up the diary recording, became over whelmed by his increased workload and resorted to diarised phone calls with the researcher. This means that their data is longer and more detailed, the researcher is aware that this could raise issues about the comparability of the reflective data, but the researcher was careful not to introduce interviewer bias and let the dialogue flow from the key standard prompts. Unlike the standard logs which covered one meeting or interchange, these more conversational reflective episodes covered several meetings or events.

### **4.5 Data transformation and presentation**

The data analysis process is at the heart of qualitative research, (Flick 2014), much like agent's knowledgeability is at the hermeneutic core of structuration, the self-aware and reflective skill of the researcher is critical to this part of the research process. Consequently, deciding how to analyse the data and being transparent about this process is critical to quality of the research findings (Graebner Martin and Roundy 2012; Miles and Huberman 1994; Simons 2009). Graebner, Martin and Roundy warn that researchers should avoid blanket use of the term inductive; many researchers erroneously claim their data analysis is inductive, when in truth it is influenced by prior research and has "a blend of inductive and deductive processes" (2012:281). A blended approach was adopted with a combination of theory driven themes and constructs, and data driven observations interpretations and findings, what Braun and Clark (2006) refer to as 'top down' and 'bottom up' (2006:83). It is notable that the data analysis process followed both a traditional normative approach to qualitative data analysis, augmented by the novel methods proposed by Stones composite research strategy (CRS) (Flick 2014; Stones 2005).

Therefore, in addition to thematic analysis with classic approaches to coding (Braun and Clarke 2006; Miles and Huberman 1994; Ryan and Bernard 2003), the data was subjected to analysis using four recurrent steps for the analysis of data recommended by Stones (Feeney and Pierce 2016; Stones 2005;). This next section will explain and evaluate the detailed methods adopted, it will describe the data handling processes, which include descriptive, analytical and interpretive data transformation, and provide details of the coding process and the researcher's reflections.

### 4.5.1 Data transformation

Data analysis involved reading and re-reading the transcriptions, whilst simultaneously listening to the audio files. This enabled the researcher to immerse herself in the data and bring the conversations to life. This approach of listening and reading transcripts simultaneously has two key benefits. Firstly, it helped the researcher (who is a dyslexic scholar and has a slow reading speed) read the transcripts effectively, secondly it enabled the researcher to hear the tone and intonation clearly (and although memos were noted on transcript when significant) this enabled, even the most, subtle changes of tone to be noticed. The researcher annotated the printed transcript with initial descriptive coding and made notes and observations throughout the process. Although some transcripts were uploaded in Nvivo, CAQDAS systems were not used in the main phase of analysis, due to the researcher's preference for a tangible tactile process. As a dyslexic academic over the years she found text much easier to process, assimilate and remember when physically touching and annotating the paper. The process of physical annotation and the use of colours are known to facilitate reading for some dyslexic people, this was certainly the case for the researcher<sup>9</sup>.

Coding is central to the first phase of data transformation (Simons 2009). Coding is a process of “[N]aming segments of data with a label that simultaneously categorises, summarises and accounts for each piece of data” (Charmaz 2006:43 in Flick 2014:373). Simons (2009) prefers the term *transformation* drawing on Wolcott claiming that it “has a qualitatively different ring to it from ‘reducing data’”. To me, it is more open and

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<sup>9</sup> For transparency, some extracts from the marked-up transcripts are included in appendix 3, these have been redacted where names might reveal HotelCo or participants identity.

expansive.” (Simons 2009:121). Whatever the title given to the process it involves three distinct processes, listed here with simple short hand in brackets; description (what happened), analysis (why) and interpretation (so what). Data analysis involves coding and categorising in a way that is “systematic, comprehensive (searching all data until categories are saturated) and cumulative, gradually building understanding or explanations” (Simons 2009:121).

Data analysis is an intuitive and deeply contextual activity, codes are attached to ‘chunks’ of text, the size the chunks can vary, the key is not to select words themselves, but focus on the meaning associated with the word/s or phrase, which are fundamentally affected by the context and the researcher’s reflexive understanding of that context. (Miles & Huberman 1994; Simons 2009; Stones 2005). This form of ‘inclusive coding’ (Braun and Clark 2006:89) aids interpretation and links data to context. This data analysis process involves “sorting, refining, refocusing, interpreting, making analytic notes and finding themes in the data” (Simons 2009:119) as such it is a creative and interpretive act imbued with epistemological biases. Thus, initial data analysis followed processes recommended by Braun and Clark, which mirrors many other research methods recommendations; the stages are, “1. Familiarizing yourself with your data; 2. Generating initial codes; 3. Searching for themes; 4. Reviewing themes; 5. Defining and naming themes; 6. Producing the report.” (Braun and Clark 2006:87)

In the first phase of coding, the researcher repeatedly listened to and read all interview transcripts in turn, correcting transcripts and reflecting on the content. At the end for each case (single GM), notes were made following the interview structure, highlighting key observations, concepts or themes and included observations about the respondent, almost, akin to characterising them in a few lines. These memos were a useful tool for reflection and encouraged a systematic approach through the early phases of data transformation (De Loo and Lowe 2012; Miles and Huberman 1994). These also helped step from the particular to the general “they tie together different pieces of data into a recognisable cluster, often to show that those data are instances of a general concept” (Miles and Huberman 1994:72). An example of a summary reflective note from one interview was, “talk the critique, walk the compliance” (Researcher’s analysis research note Jan 2016). This relates to the generic issue resistance, who and where GMs resist. Another memo note referred to the special and temporal notions of agency “Who does strategy work, ‘space’ for strategic influence,

in their own unit downward and in region across and upward” (Reflective research note Feb 2018). These notes provided early signposts to theoretical constructs evident in the data and supported the process of thematic analysis.

This process of listening and annotating was completed on all interview data from the eight GMs. Inductive coding or data driven codes emerged as follows; Background, journey, internal drive, Ethos Personal vs Company, Rituals, Personal Drive and Ethos, Implementing redundancies from restructuring, Centralisation standardisation, regional office, Decentralisation, Culture, Values, Control, Accountability, Relationships, Role of GM – changing, Strategy, Rules, Tensions, Contradictions, Resistance and Conformance, Levers of Management (Grant’s term), Deskilling at unit level, Asymmetric control – regional structures. Simultaneously conceptual codes emerged from the data, which capture constructs and concepts from SST theory. Table 4.2 shows the emergent codes from the interview analysis, extracted from research notes.

Table 4.2 Emerging codes - extract from research notes.

| <b>Emerging Codes</b>    |   |
|--------------------------|---|
| GM (A in F)              | who GM's are/background<br>view on role-deskilling, MD versus HM<br>personal ethos<br>autonomy and change   |
| Culture                  | company ethos, values, beliefs, rituals, relationships, CEO's influence, challenge  |
| Actions and behaviours   | levers of management-what acting upon<br>resilience and conforming<br>tensions, compliance and resistance,<br>mediation, interpersonal, buffering |
| Strategy/structure (MCS) | Rules, authority, accountability,<br>Centralisation, senior leadership-influence on strategy and performance management systems,<br>Restructuring |

Having explained the first phases of data analysis and coding, it should be noted that whatever the process, Miles and Huberman (1994:61) accept that “the codes will change and evolve as the field experience continues”. Therefore, this process of iteration is a product of the reflexive interpretative process that is being laid bare in this chapter. Thus far, the researcher has adopted standard or orthodox methodologies, the next section will describe the more novel use of Stones SST in the data analysis process.

## 4.5.2 Using Stones' composite research strategy

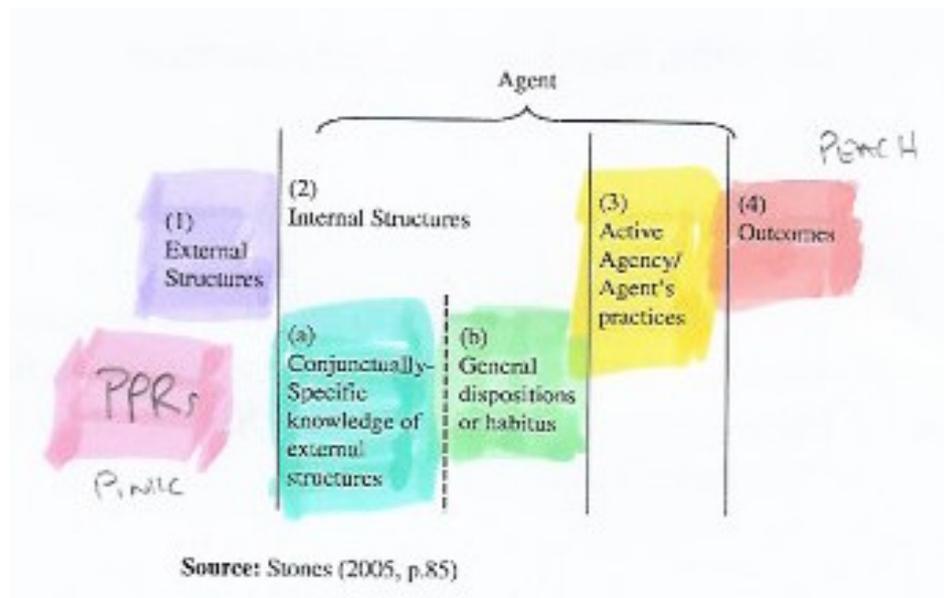
Following the example of Stones (2005; 2015) and Feeney and Pierce (2016) the researcher also adopted the nascent composite research strategy recommended by Stones (2005). This advises researchers to use recurrent steps to reveal the structuration processes for each of the agents-in-focus in turn. Feeney and Pierce neatly summarised this from Stones' original exposition (2005:123-126) their words are repeated below in box 4.1. This process was applied to the data from all GMs in the study, reveals the structuration processes at play for agents-in-focus and reveal the role of culture in strategy implementation. In addition, through this process the researcher, mapped the elements of quadripartite framework using colour coding, exhibit 4.3 shows how colours were used for initial manual coding of the GMs data sets.

## Box 4.1 Stones' Composite Research strategy – recurrent steps.

|         |  |
|---------|--|
| Step 1: | Within the bracket of conduct analysis, identify the general dispositional frames of meaning of an agent-in-focus.   |
| Step 2: | From within these general dispositional frames of meaning, identify the Conjunctually-specific internal structures of that agent-in-focus. This will reflect how the agent perceives his immediate external terrain from the perspective of his own project, role or task. |
| Step 3: | Within the bracket of context analysis, identify the relevant external structures, the position practices that routinely constitute them, the authority relations within them and the material resources at the disposal of the hierarchically-situated agent.             |
| Step 4: | Specify the possibilities for action and structural modification allowed by the identified external structures.  |

Source Feeney and Pierce (2016:1162)

Exhibit 4.3 – Colour coded quadripartite framework.



Source Researcher's Files.

The coding process continued utilizing a series of concepts that were *theory driven* (Braun and Clark 2006; Graebner Martin and Roundy 2012) but evidenced in the data, this stage of coding involved searching, reviewing and defining and naming themes, (as described above) in an iterative manner to generate the following themes (shown in table 4.3). This was initially applied to the data set from one GM, which included one interview and eighteen diary logs and although only a small proportion of the data collected, it revealed rich insights upon which to test the novel data analysis techniques using Stones composite strategy. Once established experientially as effective, this process was repeated with all GM's data sets. It is worth noting that utilizing SST in this manner contributes towards achieving objective 4 of this study.

Table 4.3 – SST Theory driven codes

| <b>Coding inspired by SST</b>  |   | 18/8/17 (and 20/8/17) |
|--|---|-----------------------|
| External Structures<br>(Context Analysis)<br>(In general, In situ)   | Rules - Signification - meaning<br>Rules - Legitimation - norms<br>Resources - Domination – power<br>Position Practices – Identity, obligations, privileges relate to role/position<br>Position Practice relations – social position relative to others           |                       |
| Internal Structures<br>Stretching away in time<br>(past experiences) | Situationally Specific Knowledge (aka CSKES)<br>Rules - Signification - meaning<br>Rules - Legitimation - norms<br>Resources - Domination – power<br>Position Practices Power, capabilities and normative expectations<br><br>(Moore & McPhail 2016; Stones 2005) |                       |
| Internal Structures<br>- General Dispositions<br>& Habits            | Worldview<br>Values & Ethos<br>Skills and Experience<br>Transposable Knowledge<br>Motivations – Knowledgeability of social context, own hierarchy of Values (source)<br>Background<br>Cultural Schemas<br>Practice orientated habitus (Hospitalableness)          |                       |
| Active Agency / Action   | Horizons of action<br>Re Ordering of Priorities<br>Creativity and Improvisation<br>Do otherwise - Resist<br>Conform   |                       |
| Consequences /<br>Outcomes   | Intended consequences<br>Unintended consequences<br>Changes to External Structures<br>Changes to CSKES  |                       |

Coding is “followed by interpretation: how we can understand and explain what coding has revealed about the views in the field, their links amongst each other, their ties to context conditions and the like” (Flick 2014:373). In this process tactics were employed to generate meaning (Miles and Huberman 1994), this included “making contrasts and comparisons, noting patterns and themes .... making conceptual/theoretical coherence” (Simons 2009:120). The researcher kept in mind that interpretation is a creative, skilled, intuitive process that involves total emersion and due of pressures of work, the research came back to the process several times over an extended period. The most difficult part of the process was to decide what data to include as evidence for each key aspect of the research problem

at hand. Simons quotes Denzin who states, “there is only interpretation. Nothing speaks for itself” (Denzin 1994:500 in Simons 2009:118). This puts an incredible responsibility on the researcher to verify and ground assertions and interpretations made from the data.

Verification was a key process during the data collection and analysis phases. During the interviews the researcher adopted a practice of verifying points made with the respondents, this included, repeating back to the GMs what they had just said, or rephrasing to clarify, occasionally the researcher would play back a phase of conversations to ensure a common understanding between the interviewee and interviewer. For example, “You knew where you wanted to go and you had a clear goal – both personally and then in each role” “So you were looking at that positive outcome for others?” (two extracts from Graham’s Interview). In addition,

[C]onclusions are also verified as the analyst proceeds. Verification may be as brief as a fleeting second thought crossing the analysts mind during writing, with a short excursion back to fieldnotes, or it may be thorough and elaborate, ..... or with extensive efforts to replicate a finding in another dataset. The meanings emerging from the data have to be *tested* for their plausibility, their sturdiness, their “confirmability” - what is, their *validity*.

(Emphasis in the original) Miles and Huberman (1994:11)

This creative process is difficult and time consuming, probably the most difficult part of the whole research process for this researcher. The processes described above provided a high degree of transparency in the interpretive processes to increase the trustworthiness of the research. Due to the nature of negotiated access and the desire not to over burden the participants, it was decided not to build in ‘member checking’ processes. This has implications for the risk or opportunity for interpretation bias for a lone researcher. So to enhance the trustworthiness of the process and as an alternative to member checking, the researcher worked closely with one of her supervisors to sense-check her findings and analysis. The researcher and supervisor spent a day with the data to corroborate the processes and the emergent codes and findings. The researcher explaining the processes and the showing the supervisor the data sets, to text and corroborate the key thematic outcomes. In addition, throughout the analysis process the researcher constantly questioned her own abductive logic, keeping in mind potential alternative explanations and interpretations from the data. This is another facet that assures research quality; a critical view of the research is presented later, which will reflect on its credibility, applicability

and limitations. Beforehand it is useful to consider how researcher presented the rich data to enhance transparency in the research process.

### 4.5.3 Presenting the data

In the context of a constructionist paradigm data from participants is presented within a rich context, in addition, individuals' local knowledge and motivations were revealed to help explicate the agency being observed. To enhance transparency verbatim quotations were extracted from the interview transcripts and diary logs with clear attribution to the participant and the elapsed time, for interviews, in square brackets, e.g. [Gordon 21.56]. These excerpts are often extracted in large chunks of conversation, or narrative recollection, to improve the credibility of the interpretive act that has necessarily taken place by the researcher. To assist authenticity where the respondent pauses there are three dots (...), any extra-long pauses are recorded as pause in brackets (pause). In addition to verbatim quotations, direct quotes from public domain information and corporate documents are used, where anonymity may be compromised names have been changed or omitted. Where the researcher deleted or changed a name for reasons of confidentiality or added a word for explanatory purposes square brackets have been used e.g. [researcher annotation]. To guide the reader through the data, the large narrative chunks and the verbatim testimony are top and tailed with rich context and exploratory and explanatory commentary. Following Creswell's advice to describe, analyse and interpret (Creswell 2013), the commentary draws on theoretical and conceptual constructs and highlights the theory driven and data driven themes (Altinay and Paraskevas 2008). All GM testimony was presented and theorised using their pseudonyms, (see table 4.1). All these findings were presented with concurrent theorising and each thematic discussion includes a reflection on the extant literature to set a context for any potential contribution.

## 4.6 Critical review of research process

Quality in qualitative research is a contested domain with many authors acknowledging the falsity of adopting natural science constructs to judge social research (Flyvberg 2006; Miles and Huberman 1994; Tracy 2010). There is a grave danger in applying value metrics for quantitative studies to qualitative studies and across paradigms which are very different (Tracy 2010). Flyvberg challenges common misunderstandings about case study research

asserting that “one can often generalize on the basis of a single case” continuing that “formal generalization is overvalued as a source of scientific development, whereas the ‘force of example’ is underestimated” (Flyberg 2006:228). Understanding and acknowledging the characteristics, and hence the expectations, of qualitative research is important when considering measures of quality and the value of contributions.

Adopting a constructionist approach has implications for judgments about research quality and validity. Tracy (2010) acknowledges that “values for quality, like all social knowledge, are ever changing and situated within local contexts and current conversations” (2010:837). Simons warns against ‘false objectivity’ (2009:162), this is the danger of trying to imbue data and findings with a detached truth that cannot exist in social sciences. Thomas and Linstead state eloquently that “all knowledge is recognised as being partial, situated, localised and self-referential.” (2006:74). The dominant discourses in any discipline area influence epistemologies, from within the discipline domains that inform this project the consensus is clear. This is neatly captured by Thomas and Linstead (2002),

acknowledging that management is a social construct means accepting that there will never be a true or accurate answer to the question of what is happening to the middle management and it is a misconception to think that such issues are solvable. (Thomas and Linstead 2002:73)

Geertz also recognises that “cultural analysis is intrinsically incomplete” (1973:29). This has implications for the expectations for contribution in studies such as this. De Loo and Lowe (2012) also respect the “context-bound knowledge and explanations” that emerge from interpretative case study research and the valid lack of ‘grand theorizing’ (2012:4). So the research findings, and hence contributions, in this study are inevitably contextual, subjective and incomplete, but this does not mean they lack quality as will be shown.

Tracy (2010) promotes a pluralist framework for quality in qualitative research which faces this challenge head on. Tracy presents a provocative (in her own words) framework of universal criteria for quality in qualitative research, suitable for “poststructuralist paradigms that are open ended and context sensitive” (2010:838). These include being worthy, rigorous, sincere, credible and ethical, providing significant contribution with contemporary resonance and coherence. This topic is worthy, because of the importance of strategy implementation. As mentioned earlier in chapter 2, it is reported that 50-90% strategies fail to be implemented effectively (Candido and Santos 2015). This is a contested area and the precise proportion of failed strategies varies over time and from different

sources (Hughes 2011), but there is a widely held agreement that strategy implementation is a challenge (Crittenden & Crittenden 2008; Dobni & Luffman 2003; Johnson et al 2003; Noble 1999; Okumus 2001; Okumus and Roper 1998). In a fast-changing globalised environment, with unrelenting pressure of mass customisation (Raelin 2011) there is a requirement for consideration of how organisations can maintain control into the future. This study explores strategic implementation practices in an international hotel organisation thus constitutes important and worthy topic of study.

In the SAP discipline there is still a call to fill the gap between macro studies and micro practices (Herepath 2014; Seidl and Whittington 2014, specifically, through the use of SST, this study addresses micro agency utilising a nascent theoretical framework (Jack and Kholeif 2007; Whittington 2011b). The international hospitality and tourism industry (and hotels in particular) constitute a growing and important sector of economic activity that makes its study valid (Slattery 2012). Hospitality applied research has long been dominated by functional studies of management, which are often self-referential and lacking in impact, dominated by positivist and neo-positivist philosophies, empirically dominated by statistical methods (Atkinson and Jones 2008; Lugosi, Lynch and Morrison 2009). This research responds to this weakness and contributes to the growing body of hospitality research that draws upon social theories.

The researcher has followed rigour in design process, (described above) with due diligence and care, grounded in extant literature and informed by novel theoretical constructs. Following both normative and nascent research methodologies in design and implementation that are appropriate to meet the research question. Through careful preparation and a consistent reflexive approach, the research is presented here as sincere. Through the use of several data sources, clear contextualisation of data and multiple embedded cases the findings are expected to be plausible (Vaivio 2008), thus providing both contemporary and significant contributions to knowledge.

Not only is this research 'worthy', as it addresses gaps in knowledge and focusses on an important topic in a significant industrial sector. It also draws on and integrates multiple bodies of research and utilises a range of concepts to establish 'rich rigour' and transparency in design and analysis (e.g. using large chunks of verbatim quotes cross referenced to data source, as explain above) giving 'credibility' to the findings. Particularly

the analysis is both structured and laid bare by the use of Stones SST. The contributions presented above, including the integration of culture and SST, provide a ‘significant contribution’ that will ‘resonate’ with researchers and move knowledge forward in several different ways. Adhering to the University of Brighton’s Code of Practice and Regulations for Research Degrees throughout the process this research adopts high ‘ethical’ standards, including non-maleficence and beneficence. This thesis has been crafted to demonstrate a ‘meaningful coherence’, to align the literature, the theoretical constructs, the methodology and analysis to address the research question with no deviation.

It is important to acknowledge the limitations, or rather limits of this research. The term limits is preferred to limitations because that latter implies inadequacy, rather than the former which implies boundaries or bounded. In keeping with all small-scale interpretive case study research projects, the ability to generalise is limited, in fact is not normally part of the research aims and aspirations. Generalisation is defined as “the transfer of research results to situations and populations that were not part of the research situation” (Flick 2014:537). Existentially constructionist research is imbued with subjectivity and the resultant knowledge is context specific; ideographic in nature, thus not generalisable in the classic sense. “Formal generalizations appealing to propositional knowledge” often associated with positivistic paradigm, “would assume that the case was typical of a wider population”... but “cases are not typical” Simons (2009:164), in fact, in a constructionist paradigm all cases are unique and all knowledge contextual.

Online these lines, Flyvberg provides a counter narrative to the classic criticisms of case study research which states that “[P]redictive theories and universals cannot be found in the study of human affairs. Concrete, context-dependent knowledge is, therefore, more valuable than the vain search for predictive theories and universals.” (Flyvberg 2006:224). Thus, when the term generalisable is used in this context it is used with care and to mean particular forms of knowledge transfer. Simons identifies five forms of generalisation: - cross-case, naturalistic, concept, process and situated. Within the interpretation processes, cross-case generalisations helped to reveal patterns of behaviour, common issues or tactics of managers. This case study may reveal process generalisations, in a contribution to understand, through use, how SST can facilitate the understanding of agency in organisational settings. Finally, cases can be used for theory generation (Simons 2009),

through use of grounded theory (not employed here) or through cross case analysis, which has been utilised with the embedded cases in this single case organisation.

The constructionist approach adopted created limits to the nature and type of contributions possible from this study to those that are processual and theoretical (Flick (2014); it is inappropriate to try to draw out generalisations of any other sort. When asserting the contributions, the researcher has been mindful that “all knowledge is recognised as being partial, situated, localised and self-referential.” Thomas and Linstead 2002:74), so “the only generalization is: there is no generalization” (Flick 20014:495).

### **4.7 Summary and Conclusion**

The research methods utilised have been presented, justified and grounded in the researcher’s underlying philosophical positioning. The research methods were shown to be appropriate, by drawing upon the extant literature in the field and providing a clear rationale for the choices made. The study has been designed to fill gaps in knowledge and provide the basis for making a significant contribution to knowledge in key conceptual and methodological domains. It is important to reflect that all research requires choice and those choices close off certain other options and have consequences, this too has been made clear, not least in the discussion of limitations. Therefore, the detailed findings will be presented next, before presenting the contributions and other avenues for future enquiry in the final chapter.

## **Chapter 5 – Findings and analysis**

### **5.1 Introduction**

The aim of this chapter is to present the findings from the primary research to reveal how middle managers implement strategy through their day to day practice, in doing so achieving objective 3 (see Chapter 1 pg. 5). The rich and detailed qualitative data collected reveals the managers' agency. The thematic analysis is steered towards answering the research question in the context of significant strategic developments in HotelGroup and HotelCo. It is useful to remember that this study takes a strategy as practice (SaP) perspective and employs a culturally imbued structurationist approach to understanding strategy implementation. Drawing on a practice perspective, this constructionist study, requires a committed and detailed engagement with the strategic context for action, and the self-reported agency and reflections of the managers in the field. The rich qualitative data provided could reveal the identity of the case company and the participants, so as mentioned in section 4.5.3 (pg137) pseudonyms have been assigned to disguise the people and the company. This has required the renaming of key strategic initiatives relating to the business strategy and service ethos training as will be explained.

The chapter is structured to firstly present a rich picture of the case company to provide a context for agency. Then the managers' strategic implementation actions and decision making (praxis) will be presented, with an emphasis on a particular strategic initiative and the structuration processes at play on the agents-in-focus and their position practice relations. In addition, the role of culture in their agency will be explained. The rich data in the form of examples, quotes and vignettes is presented along thematic lines with concomitant theorising and reflection in the context of extant literature to provide a platform for the contributions to knowledge.

### **5.2 Contextual Setting - Strategic Context**

This account of the case company and its strategic context is constructed on evidence from public domain information about the company and the sector, interviews with senior managers, and the GMs' testimony. In line with a constructionist approach, it is important to build a rich picture of the sociocultural and economic context for practice of strategy

implementation. This portrait provides contextual explanation of the macro forces at play in the sector and the company's responses, it also provides the reader with knowledge of the issues impacting on individual units and hence the practice of GMs at the heart of this study. This strategic context informs, to a lesser or greater extent, the agents' knowledgeability and their understanding of the strategic terrain.

### 5.2.1 Case company portrait and complex stakeholder arrangements

HotelCo is one brand within a larger multi-brand international hotel chain (HotelGroup), which has grown significantly in the past, with a 17% compound annual growth rate in the number of hotels operated (Corporate Presentation August 2011). HotelGroup has operations across the globe and brands in all major segments, (focussing on EMEA<sup>1</sup> it operates in 60 countries, with over 420 hotels in operation or pipeline) as such, it typifies many international hotel chains. It has a global head office in Europe and regional offices around the world, but this case study is limited to units within the UK, within the region of UK, Europe and Ireland. HotelCo is one brand among several in HotelGroup, established at first class standard full service, normally four-star properties, often described as upper-upscale (Hotel Analyst 2018). The HotelCo brand ostensibly has a unique character and style, with a focus on design, pioneering contemporary internal architecture, dramatic atriums with stylish features and facilities with a "culture of innovative thinking" (Company Fact Sheet 2010). Claiming to be iconic and sophisticated, the brand (and the group) has grown with self-proclaimed dynamism and creativity (Annual Report 2014). Growth has continued, following a difficult period in the 2009 global recession, through focussed cost saving projects, revenue generation, fee-based growth and tight asset management (Annual Report 2012; 2014). As a public limited company, HotelGroup must deliver results to the stock market, it has maintained its performance through focussing on performance, divesting of hotel units that do not perform or cannot maintain brand standards and operating new units increasingly under management contracts following an Asset Light Strategy.

As the company has matured it has increasingly adopted an Asset Light strategy, as mentioned in the introduction to the thesis (Chapter 1), this is critical to growth and

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<sup>1</sup> EMEA = Europe Middle East and Asia

competitive advantage. As a result, value generation and return on investment is shared between owners, operators and brands. Owners are a key stakeholder in the strategic development of the group, growth relies on partnerships and there is competition to attract investors and owners with capital and properties to maintain pipeline growth. As a result, in the case company, there has been a recognition of a need to develop more formal systems, to exert tighter control on brand standards, reliability and costs. This is evidenced in the priorities in the recent annual report, which include Revenue Generation, Fee-based Growth, Cost savings, Capital Utilization and Asset Management (Annual Report 2013). This fairly standard industry response has also been revealed in interviews, documents and long-term engagement with the case company. What is significant for this study, is the implication for the agents-in-focus. These complex governance and operational structures result in hotel GMs having to deal with a complex range of stakeholders in their day to day practice. One GM acknowledged that,

the challenge is that you have a flora [plethora] of different ownership structures within our organisation .. and some of them have, in the last 5 or 6 years since the recession, ended up in some serious financial difficulties. (Jeff Interview) [27.56]

One of the important relationships GMs must manage is the relationship with the owner/s. The motivations, experience and financial wellbeing of the owner have a great impact on GMs autonomy and the day to day running of the hotel. In regular meetings GMs are potentially held accountable to an Owner, Asset Manager, Head Office, Regional AVP and/or Regional RM. Interviews and logs reveal the diplomacy and emotional capital required by GMs and the impact of different types of owners have on the Unit's fortunes. Frieda confirmed that it was often better to have an institutional owner, rather than an independent owner.

Absolutely because then they ... it would allow you to reinvest in your property but you are the management company and you are the GM and they let you run the business. Whereas, a smaller owner and maybe someone who has got previous experience of running their own, of being a GM ... I have not had that but I have colleagues who have been in those situations and it is tough. (Frieda Interview) [27.56]

GMs meet regularly with the owner whose experience and agenda have a huge impact on the interactions and the level of autonomy and discretion GMs have to run their business (Hodari and Sturman 2014). One GM recounted, “And the owner relationship is something that is very precious, because if you don’t have that relationship with the owner... it can make or break your career ... I have heard horror stories of owner-meetings” (Graham Interview) [1.10.43]. This reveals the criticality of owner /manager relationships. Neville recalled how he first experienced owners for whom the business was very personal to them, they were closely involved and deeply emotionally invested “they treated it very much as a reflection of them as people” (Neville Interview) [16.00] as opposed to institutional or international investors.

Some owners treat their business in a very personal way, this brings a human element to the ownership relationship and takes it beyond economic impersonal decision making. Thus, adding to the complexity of social interactions and management decision-making. Since the financial crisis, as lending restrictions have tightened, many hotel property owners faced financial difficulties, when properties are in administration there is often an extended period of uncertainty and lack of investment. One GM relayed her experience of managing a hotel in administration “it is very difficult for me to look at strategy for the hotel, because there is no investment in the property. The property is tired. It needs money spent on it” (Freida Interview) [29.00]. These excerpts demonstrate the importance of the relationship with owners and gives a flavour of the challenges faced by GMs in the complex governance arrangements that now typify the international hotel industry.

### 5.2.2 Sector dynamics and strategic responses

The change in consumer expectations and the impact of search engines and other electronic word of mouth (EWoM) platforms e.g. TripAdvisor, has revolutionised the industry. In this industry a customer experience in Dubai must be commensurate with an experience in St Petersburg, Beijing, London, or Luton, thus brand standards are fundamental to success. With ever increasing use of EWoM, managing reputation becomes increasingly important. All hotel chains have system for monitoring social media and have a combination of online bots and personnel focussed on this. HotelCo require all units to respond to feedback, good or bad, this is sometimes the GMs remit or the Front Office Manager. Evidence from GMs revealed that HotelCo was in the process of developing central guidelines and approaches

to ensure consistent responses for all customers. Graham recounted in a diary log that it “had been found that within the last year to 18 months the number of online reviews being received had grown by over 300%.” (Graham Log 05/08/15) and therefore there was a need to review how HotelCo managed this function. Consistent brand standards are central to maintain quality and customer satisfaction There has been a series of initiatives to ensure equal standards across the estate, including Mystery shoppers scores that provide a key KPI for GMs and HotelCo also has Medalia, a third-party electronic guest experience/satisfaction survey system. All hotel units have targets for satisfaction and their Medallia scores, also in HotelCo they have a well-publicised 100% satisfaction guarantee.

For the GMs, the agents-in-focus in this study, this provides a dynamic control measure and also forms a key part of the dashboard of KPIs they are monitored by in the strategic control environment. Social media is an area where the HotelCo currently empowers staff to make decisions and GMs also delegate decision making to their team. In a real time, service operation problems will inevitably arise, staff must have the confidence to make reparations in real time. This is neatly captured by one GM, reflecting on Trip Advisor and the guest satisfaction guarantee of Hotel Co, Gordon recounted the balancing act necessary, to balance customer potentially seeking freebies by complaining, matching materiality of complaint and disruption with appropriate recompense.

Absolutely – and the other problem is that you have to be very careful what you say on Trip Advisor, because if you turn around and say “Oh we will give it to you for free” then that unleashes all sorts. (Gordon Interview) [1.23.50]

This is another example of the day-to-day actions and decision making of GMs the reflective monitoring of the company’s strategic context, the various stakeholders (in this case customers) in the field of practice relations.

Combined with the increases in the use of OTAs<sup>2</sup> such as Expedia, Booking.com and the well-established and widespread use of dynamic pricing<sup>3</sup>, the way hotel bookings are

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<sup>2</sup> OTA stands for Online Travel Agent, examples include but are far from limited to Hotel.com and expedia. These online intermediaries provide a critical access to the market, arguably drive down rate and charge commission to the hotel thus reducing margins.

<sup>3</sup> Dynamic Pricing is a practice of changing prices in response to demand to ensure a unit maximises its revenue and profit performance

managed has been revolutionised in the last decade. The relationship between hotels and OTAs is problematic for hotels and the need for rate parity (across all platforms) has eaten away at hotel margins. All OTAs charge a fee for booking through their platforms., this can range from 15 to 30 percent (Feinstein 2018), so hotels are desperate to drive bookings to, and through, their own websites, with a range of loyalty and other incentives. This clearly forms part of the GMs' understanding of the strategic terrain and their knowledgeability. When discussing online intermediaries in the initial interview, Jeff recognised the need to drive more bookings through the corporate website; "not enough is coming through our own website, and that is of course a problem that we are addressing... you need a loyalty program that is incredibly strong, ... but, but, our loyalty following isn't as strong just yet" (Jeff Interview) [12.54].

Another competitive challenge is rate parity. Rate parity, the requirement to offer the same rate on all platforms, has been the subject of lawsuits and European legislation. Deloitte characterise this as a battle for customers, a "perpetual tug of war between travel suppliers and online intermediaries" (Langford and Weissenberg 2018:14) that has been going on since the late 1990's when OTA's first emerged (Barthel and Perret 2015). The criticality of website optimisation and competitive pricing have resulted in huge investments by hotel companies in revenue management and online booking systems, which operate on centrally controlled platforms. In the UK many hotel companies have centralised their Revenue Management functions in offices around the Heathrow area, this has created a unique strategic context for HotelCo's centralisation strategies, which will be discussed later. In summary, the macro (industry) context for the case company, described above, provides insight into the characteristics, challenges and changes within the sector, this has driven a series of strategic responses and has shaped HotelCo's ongoing strategic initiatives and priorities.

### 5.2.3 Structural change and centralisation in HotelGroup

HotelGroup responded to the sector dynamics and its own growth through a series of strategic initiatives, generating structural, cultural and systemic changes affecting HotelCo and the middle managers in this study. Testimony from several of the participants and evidence from company's public domain information, reveal a key strategic shift in the HotelGroup. There has been a decentralisation from global head office of HotelGroup to

the regions, but simultaneously there has been a centralisation of key functions within the region affecting HotelCo's units. One GM described this succinctly, "We are going through a massive decentralisation approach, at the moment (pause) it has gone from head office, [Name of European city] making the decisions to now the Area Office" (Freida Interview) [24.55]. David neatly captured the counter posing changes.

You know... ummm ... but you can see I think the organisation from the strategic point of view, is decentralising, as we know. (Pause) But also then the properties: there is also oddly a decentralising happening the Regions, and almost a centralising happening with some of the processes that we are bringing in to the hotels, like the room service menu, and the Christmas brochure. [39.10] (David Interview)

In this structural change the locus of control has moved closer for GMs, the strategic terrain is therefore different, with the hegemonic power being less remote.

There has been clustering<sup>4</sup> of the HR function with the reduction of unit based Human Resource specialists and the move to area-based HR cluster managers, these managers will look after all brands in HotelGroup for a particular geographic area. They can cover several units depending on the demands of the units, size, staffing, complexity of offer and level of outsourcing. In addition, there has been a clustering of the finance function, with regional and clustered Financial Controllers, higher levels of automation in basic controls and the retention of only lower grade controllers in many units. This is both supported and driven by system development, centralised procurement and cost cutting (Corporate Presentation 2014; Robert -interview data). The strategic drive behind these changes is to improve "business intelligence and resilience" (Robert Interview), standardise processes and maintain tighter control on the business results in all units (Corporate Presentation 2014). It should be noted that these initiatives have both recognised benefits and draw backs, as the GMs testimony will reveal. The most important centralisation initiative has been the centralisation of Revenue Management Function, this is important because it is a critical strategic response to competition and the market changes already described (Robert 2017), and also because of its impact on the hotel units and the GMs role and day to day activities in particular.

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<sup>4</sup> In HotelGroup clustering refers to employing one person to lead a function for 3 -5 units that are geographically close (usually based in one of these units), it is distinct from centralisation.

In line with the sector trends, the centralisation of the revenue management function has been the major strategic initiative in HotelGroup. This has also involved strategic global alliances in loyalty club scheme (Annual Report 2012) and restructuring of staff, recruitment of new professional revenue managers in a central unit, the introduction of new protocols and procedures for setting rates in the HotelGroup UK (Robert Interview). The 2014 annual corporate presentation revealed the continued focus and investment in Revenue generation, with “a mega-implementation of our fully transformed RevGen strategy” including among other facets analytical transformation (Corporate Presentation 2014:29).

It is worth reprising at this juncture the nature and importance of revenue management for readers who are not au fait with hotels. Hotel rooms are a perishable product, so pricing decisions are critical. Within the competitive context already explained above, Revenue Management (RM) has become a highly specialised and technical function. The aim of RM is to set pricing when a business has fixed capacity and perishable product. Pricing (rate) and occupancy are critical to the success of a hotel company, measured by a critical metric RevPAR (Revenue per available room)<sup>5</sup>. In addition, HotelCo also has a strategic focus on developing its food and drink offer (F&D) and its meetings and events businesses (M&E), extending these additional services is central to optimising performance of many hotel units and the key to strategic advantage (Robert Interview). For example, in the interview with a participant GM, he acknowledged the importance of meetings and events business in his unit.

Yes ... we always debate that if we can get the meetings and the conferencing right, and perhaps a certain element of that being residential, if you can get that right and at the right rates, or the rates that we would aspire to have, or need to have to reach our targets, then the rest will fall into place. (Jeff Interview) [15.41]

Most hotel chains have, or are moving to, specialised centres for Revenue Management (as mentioned above), where data analysts use complex algorithms to forecast demand and

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<sup>5</sup> RevPAR (Revenue per available room) is a key industry performance metric that is driven by room rates and occupancy. Criticised as too focussed on room revenue, it is being replaced or augmented by TRevPAR (Total Revenue per available room), which takes account of the revenue generated by guests across the property and associated services.

set prices for each hotel unit. Rate and occupancy are the critical drivers of performance in a hotel alongside the ‘all important’ customer service. Thus, it can be seen that revenue decisions go to the heart of performance of any hotel unit and fundamentally the personal performance-evaluation of GMs (including their success and standing amongst their peers and senior managers), so the stakes are very high in these decisions.

In HotelCo, the centralisation initiative involved downgrading the RM post in the hotel units and drawing experience into the centre in Heathrow, to create expert central revenue managers (CRM) whilst leaving a Revenue Office Manager (ROM), in most units. The AVP confirmed that this initiative was key to “improving performance and also addressing skills shortages in Revenue Management” and had resulted in an “increased focus on TRevPAR and increased M&E revenue” (Robert Interview). Robert acknowledged there are downsides to this strategy, in that several hotel companies have located their Revenue Management centres in Heathrow and so there is a high level of ‘poaching’ of staff between rival companies (Robert Interview). This regional (UK) centralisation emerges in the data as a key strategic implementation initiative which GMs have to mediate, and which reveals much about the micro agency of middle managers in strategy implementation. This will be the main focus of the findings presented below; in the evidence that will be presented, there are examples of resistance, conformance, boundary spanning, power dynamics, diplomacy and buffering by GMs, which form a rich picture of the role and praxis of MM, and GMs in particular.

### 5.2.4 Strategic controls and culture

In addition to key strategic priorities and changes identified by the HotelGroup, HotelCo and the AVP, there are several in-situ strategic control mechanisms that affect the praxis of middle managers i.e. the day to day practices of GMs. These controls form part of the strategic context for action and so are worthy of brief explanation here. As would be expected in a Public Limited Company (PLC) context, there is a complex range of controls covering financial, operational and quality controls. These are all fairly standard in a full-service hotel setting, but there are some which recur in interviews and log data that are worth explaining before presenting the data. Providing overarching strategic direction, the company operates a multi-dimensional performance management system (MDPM), similar to a Balanced Scorecard with four dimensions, adapted to the business’s key

strategic priorities. This strategy control system integrates, key performance indicators, budget requirements and targets for financial and non-financial factors arguably encompassing cultural controls, cybernetic controls and linked to reward and compensation systems (Malmi and Brown 2008). It addresses four dimensions; 1) HRM and organisational culture, 2) Focus on guest experience, service culture and innovation 3) Business success including revenue maximisation, cost optimisation and profitable growth and 4) delivering results for stakeholders. All units have a bespoke performance management scorecard linked to HotelGroup strategic priorities in each area, this will be called Business Strategic Plan (BSP) as using its real nomenclature could reveal the company's identity.

The literature review established the role of culture as a control mechanism (Geertz 1973; Inglis 2005) and Malmi and Brown (2008) included culture in their 'package' of control systems. In addition, the importance of organisational culture in the hotel sector has been established (Goss-Turner 2010; Harris and Ogbanna 2002). HotelGroup have clear espoused service culture, branded with a three word catch phrase. Using their actual catch phrase would expose the company's identity so throughout this thesis the term "*Service Ethos*" will be used in place of the actual words. HotelCo clearly and overtly recognises the importance of culture, "design might be the statement of HotelCo, but culture is still our king – and our people are everything. With our Service Ethos" (HotelGroup Corporate presentation 2014). Cultural cohesion and consistency are enhanced by promoting from within, "95% of our General Managers are home grown" (Corporate Presentation 2011:47). HotelCo make great play on their attention to the employees, in all public domain statements they celebrate the company's service ethos, which is simple and clear. The service ethos is supported by a biannual training regime for all staff, at all levels of the institution, with package of activities and calendar of events developed and coordinated from head office and region. Ironically, following the disintegration in the sector (Roper 2018) most employees in the hotel units are not employed by HotelCo, although they are subject to the training and cultural inculcation associated with the Service Ethos. The Service Ethos is arguably imbued with hegemonic power (Ogbor 2000) and so the extent compliance and resistance is interesting to observe.

In the literature review it was also acknowledged that culture is pliable, and this is the case for HotelGroup. Driven by external trends and internal changes at the top of

HotelGroup, there has been a gradual change in the culture in the HotelCo organisation. All GMs noted these changes and the impact they have on their relationships and the control environment. A long-term charismatic leader retired from the role of President and CEO, this is not unique there have been changes at the top of many hotel companies. But Roper et al (2001) notes the influence of the values of founding members of hotel groups, with the departure of the founding leader in the case company a change in approach has been observed. Grant unequivocally related the changes in HotelCo to the departure of the founding CEO (referred to by a pseudonym RJ) in HotelGroup, reflecting on the changing emphasis within the espoused values and culture, in particular innovation and design, he said.

So [RJ] was a ... I mean a first-class cowboy! But he had that eye for something. Yeah? But against that, we did it in a shambolic fashion, with no control, which we quite liked. And now we have had to come in with the size ... so the organisation has some structures. [30.58]

So I ... I know I say there are these issues. I also understand that it is quite a difficult shape to form. And we are at that point where we have 40-odd hotels in the UK now and there has to be some commonality among them. (Grant Interview) [31.06]

The new President and CEO appointment came from within the industry from another global hotel group, with strong brand identity and a different culture, inevitably there followed a change in emphasis and style, the impact this has on delegation, priorities, language, rituals and symbolic action, is subtle yet significant. The espoused corporate values have been reframed and relaunched, consolidated under three key headings focussing on hospitality, trust and innovation (Corporate Presentation 2014), although the long standing and sector leading “Service Ethos” remains unchanged. The change in leadership and culture, is a move to professionalise the company in the face of the strategic and competitive demands already explained. All GMs referred to the change in culture, structure and leadership. There has been an introduction of a performance management culture, statements in the corporate presentation and interview data reveal this initiative. “Another important step towards establishing a performance culture was the alignment of our management incentive scheme” (Corporate Presentation 2014:38). Also the AVP declared changes in culture have professionalised HotelGroup further, referring to GMs he stated “they are still hoteliers but they’re hoteliers now with business sense.” Robert Interview [18.35]. He continued.

in the new organisation its more process driven, in terms of decision-making. There used to be more subjectivity, there has been significant developments in HR, a much more structured approach to human resource development, and head office have a clearer line of sight into the middle levels, clearer head of department profiles, so a much more structured approach to HR. (Robert Interview) [4.08]

One GM neatly articulated the change, grounding it in the HotelGroup's growth strategy; whilst discussing change and growth in the interview, she stated.

We have. [been growing] We have ... But I don't think the company was growing but we weren't growing internally. We weren't developing our procedures. We weren't developing our systems. We were still a small company with lots of hotels. Whereas now we are a large company and we ... we are trying to get the procedures and the systems to match ... that growth. (Freida Interview) [24.09]

This professionalisation and the process improvements inevitably have consequences for the practice of GMs, for example, one side effect is the perceived deskilling of the GM's role and the units in general, this and other themes will form key elements of the findings.

The BSP, along with the Service Ethos, provide strategic guidance in the HotelCo units that is aligned to regional and global aspirations of HotelGroup. Within this context there are a series of operational controls. Market and customer orientated controls include social media EWOM monitoring and response system (Revinat), plus customer satisfaction survey and mystery guests scores (already mentioned). In addition, human resources management is measured through the "Weather Report" (pseudonym for staff satisfaction survey), there are financial and operational controls including, annual budgeting, financial controls, central procurement systems, and other operational control systems. These systems and controls result in multifaceted control context (with almost omniscient observation), with holistic monitoring of GMs and their units from the regional office in the UK. This array of control systems provides the strategic and operational context for the agency of middle managers and provides the spatial and temporal limitations for praxis in strategy implementation. A feature of this research is to understand how middle managers exert agency in what appears to be a tightly controlled organisational setting.

The data in this research will provide examples of managerial agency and will help reveal the extent to which middle managers can exert agency.

### **5.3 Strategy Implementation - Centralisation initiatives and strategic practices.**

The contextual setting reveals key tensions, challenges and change initiatives that bear down on the strategy implementation by GMs on a day to day basis. Analysis of the data will reveal this practice, which from a theoretical point of view, is affected by agents' own analysis of the strategic terrain, both the macro strategic imperatives and the local strategic characteristics and their internal structures incorporating contextual knowledge and general dispositions (Stones 2005). Active agency is here recognised as an accomplished task, which is enacted by knowledgeable agents, who will each possess different motivations for action and varying levels of capability and capacity to exert agency.

The centralisation of revenue management is a critical strategic initiative, that is vital for the success of HotelGroup, Hotel Co, the individual units and the GMs, it provides a rich strategic context for the micro-practices of GMs. It provides a context for GMs strategic implementation practice which incorporates a variety of responses and reveals nuanced nature of middle manager compliance and resistance. The practice will be explored to expose active agency, potentially including negotiating interpersonal tensions, the invoking of power, position and exposing the complex and often contradictory systems of accountability. Most GMs feel that this initiative is a positive one, but all GMs experienced challenges in its implementation. These challenges emanate from the lack of understanding within the central revenue team of the specific local circumstances of the units, from the power dynamics between central function and unit, and from impact of temporal strategic priorities on unit performance.

The challenges that will be explored include communications and interpersonal negotiation necessary in operating a remote and centralised revenue management function. The lack of face to face contact between the units and central revenue function potentially affects interpersonal relations which could be strained in these mission-critical time-bound regular decision-making episodes. In addition, regional head office hegemonic power imbued within the revenue function, could impact upon GMs' autonomy and power. There is the

possibility of tension between a unit's unique strategic context and the unit-based business strategic plan (BSP) and the drive to pursue central strategic targets from within the revenue centre. Within the context of this strategic terrain (or 'field' as Bourdieu would characterise it), key roles are enacted and the position practice relations between the GM and the CRM need to be developed and established.

### 5.3.1 GM Agency - Strategically aligned implementation practices

Overall responses to this change have, on balance, been positive, Nigel discussed the revenue management initiative, noting that the UK has led the HotelGroup implementation of the "revenue piece", he acknowledged "it's about professionalisation and moving the emotion out of the property" (Nigel) [1.29]. There is a recurring theme through all interviews about professionalisation and improving the business decision-making (which is part of the cultural change). This emerged in interviews with Robert. "That's a big change, but it was a way of actually getting performance and also dealing with the skills shortage in Revenue Management." (Robert Interview) and Jeff reflected on the changes and noted a shift in emphasis "we have become a lot more corporate in our strategy" (Jeff Interview) [49.24]. The Regional AVP, Robert, reported that the motivation for this initiative is to improve performance of HotelCo, by maximising rooms revenue as well as driving more business through Food and Drink (F&D). Its strategic importance was recognised overtly by nearly all GMs. Gordon acknowledged that this strategic initiative had been very beneficial for Bristol, in his initial interview, he reflected on the impact on him and his unit,

But I think we have actually made more money by doing that because we had... [36.12+] And I think that having a revenue manager on site in the city puts that person in a position of ... constantly looking at the competition. He is too close to the 'thin red line' you know ... and he is not prepared to 'push the boat out'. When we moved our revenue office out of the hotel our room rates shot up. We are nearly £10 more expensive this year than we were last year. [37.27] (Gordon Interview)

Although these rate increases may be partly due to external factors, for example the business cycle, Gordon still acknowledged the benefits to his unit and for him.

It can be observed through these GMs' testimony that the structures of legitimation and signification change, in this case it is reasonable to expect that the cluster team will operate in a different cultural context. In the centralised cluster revenue office environment, where the limits of acceptable conduct facilitate them to push for higher rates, taking more risks. Also, they will not have any qualms about selling a room at a low rate, when required, having less of a relationship to the hotel unit itself. One GM acknowledged benefit of distance, but also the natural emotional response to pressure to sell at whatever the price (it should be remembered at this juncture, that this is a perishable product). On reflection, several GMs acknowledged objectivity can counter possible subjective value judgments.

It does bring a lot of objectivity to the situation whereby you have somebody completely removed from the environment. So, whereby you ... you sometimes do become very emotional about: "Well I am not selling my property for that!" (Graham Interview) [53.49]

In this new strategic initiative, network relations associated with revenue management have changed and new position practices are emerging. This geographic change arguably relocates the sites of signification, agents in the field are located in an office environment remote from the hotel units, where the local structures emphasise the financial performance of HotelCo and targets for room revenue maximisation. Compared to the Hotel units where structures of significance are arguably imbued with a focus on the guest and the unit itself.

Other GMs reported great team work and mutual respect as evidence of the effectiveness of the strategic implementation initiative. GMs work with their cluster revenue manager (CRM) to solve problems and optimise the business performance of their Unit. For example, during the budget planning process Nigel was faced with an unexpected demand to generate an extra £200k revenue, he recounted "I have got a very good relationship with her [CRM], and I have worked with her at Heathrow in the past" (Nigel) [36.52].

She said "You have got to find this extra £200K" [unclear] And at that point I didn't actually involve the [unit based] team. I said "Look let's have a quick look." We needed to get it in by the next day. So we had a quick look and "This is what I think we can do" And I had been a couple of nights before at a Ryan Air presentation and they were talking about 1.9 million passenger increase alone, through Stansted next year. So, we looked at how many flights that was and the impact of Ryanair Crew staying here. They have to pay their own rather than having a contracted thing. So, we just put it across that segment and thought ... "well you know..." And that ... with a low rated segment, so it would

make this ... we could easily ... if we could over exceed in another segment it would compensate for the lack of ... crew anyway. (Nigel) [36.52]

The strategic terrain for this GM constituted an enforced additional demand to generate more revenue, after the budget process had been completed. This had come down from Head Office (HO) and Region had arbitrarily determined which units would be implicated, without any consultation.

What is relevant here is the value and importance of good interpersonal relationships with the CRM, the importance of trust and mutual respect in these geographically remote working relationships. This micro incident also provides evidence of the strategic control context and GM's game playing behaviour, enacting compliance and resistance in financial control and budgeting processes in time bound day to day decision making. This is another example of a GM utilising his knowledgeable ability of the strategic terrain, playing one segment off against another. In cooperation with the CRM here, clear position practice relations empowered the GM to respond to demands from head office and region to dramatically increase revenue. By drawing on his own capabilities and conjunctural knowledge, plus an understanding of role, norms and sanctions, he put the revenue into the low rated segment, so this would have a minimal effect on incentives (which are based on GOP) and would be easier to deliver on financial results later. This is another example of middle managers agency, reflecting on previous experiences, using his tacit knowledge of the politics and culture of control, serendipitously drawing on knowledge he had that region and HO didn't. His motivation for action was to protect his unit's performance, whilst responding to what he might interpret as unfair demands from HO. With full understanding of the macro strategic imperative of revenue optimisation and his role as GM, he mediated the local (micro) needs and the corporate (macro) response to market changes.

Other GMs saw the cluster team members as part of the hotel team "the way I operate we are all one team in terms of Heathrow Central Revenue, it may as well be the revenue manager here at the hotel." (Neville) [1.00.58]. Neville's view of this initiative (after initial cynicism) was that the unit drives the strategy, but that Heathrow provides the business intelligence.

the data, the market intelligence, and the ability to analyse that.. ... I was going to say 'quickly' but I think 'in a timely manner' would be better. To allow you to react daily and weekly, is very, very important. And we are becoming better at that by the day. (Neville) [59.41]

There are many other examples of unit/central revenue discussions and decisions revealed in the interviews and diary logs. It is clear throughout the research data that rate decisions are important, in fact the revenue decisions are the single most important area of decision-making, hence HotelGroup's decision to centralise this function.

Although rate decisions are taken every day, with an early revenue call in the mornings and other periodic and ad hoc revenue conversations taking place throughout the week and month. It is clear that some rate decisions have much greater impact than others. Graham relayed an episode in his unit where there was a request for rate (RFR) was received which required a very quick decision. However, this decision would have a huge effect as it was with a large clearing bank that involved high volume of business. It is clear to the researcher that getting the corporate rate right in these circumstances is critical because it fixes the rate for the whole year and there is a very high volume of business involved. In the diary log Graham recounted the meeting where the Director of Sales (DoS) wanted to offer a high rate to give room for manoeuvre in negotiations, but this GM's own understanding of the strategic terrain made him feel this was too high and too risky. Cognisant of the local dynamics, the fact that there were no major events in the city that year and the fact that this was a high-volume contract, it would be very important to the success of the unit this year. The agents conduct analysis, revealed to him the need to get a lower rate and yet also following his natural disposition, thus ordering his concerns, he navigated the team through the decision making, without imposing his views.

In these conversations, there was resistance (from the DoS) to reducing the rate offer. Based on past experience the GM knew he needed his team to come to a decision themselves, by asking various question about scenarios and getting the DoS to do calculations, the unit team became more open to starting at a lower rate. Then by opening up the conversation to the CRM (remotely over the phone) he was able to broker agreement between all parties for a lower rate than originally proposed, that was underpinned by calculations and a rationale that everyone was happy with. This mediation by the GM is critical to be assured that the best business decisions are made to implement the BSP for

the unit. Whilst working with a centralised revenue function and yet maintaining the trust and delegated responsibility of his unit-based team. This accomplished practice, draws upon the knowledgeable ability of the agent-in-focus (GM) in the context of his position practice relations. The role of GM is imbued with performative positional identities, rights and obligations (Cohen 1989) that provide a bridge between structures and agency through in-situ knowledgeable ability (Stones 2005). Graham drew upon knowledge of the local business context, his understanding of people management, the roles of his team and his experience with his GM mentor,

Err ... from the previous similar conversations that ... and decision-making meetings that I had been involved in with my Mentor – [Jeff] – there is always a need to gain agreement from all in the room. (Graham Log)

Ultimately, he had the power to impose his will on the team, but he navigated them to take a decision based on evidence, calculations and rational logic, which ultimately chimed with his intuition. What can be observed here through the lens of SST is the practice of the GM drawing on his own dispositions and internalised structures reflecting norms, meaning and power relations enacted in his “hermeneutic mediation” (Stones 2005:21). His personal dispositions, or Habitus, predispose him to find collaborative solutions whilst facilitating learning and empowerment in his team. His conjunctural knowledge informed by his interpretation of the contemporaneous structures of significance (i.e. understanding the importance of keeping this corporate business) and communicating meaning (the effect and risk of setting the rate too high whilst there is spare capacity in the local area) and guided him to take particular actions to facilitate this rate decision.

The conclusion was reached through collective calculation and logical conversation, as opposed to (from my part as the leader of the organisation) simply saying ... ‘no this is not correct, and this is where we should go at’. (Graham Log)

This is another example of the mediating role of the agents-in-focus in this study, implementing strategy on a day to day basis. Whilst managing power asymmetries and facilitating time bound decision making, enacting the position practice that is institutionalised in a Hotel GM. Through a variety of examples, the accomplished practice of middle managers has been demonstrated to uncover how they implement strategy on a day to day basis, revealing how GMs augmented the process of centralisation by

effectively communicating local knowledge and mobilising this to steer decisions. In addition, the testimony of GMs shows the spatial shift in structures of signification and legitimation and its implication for agency.

### 5.3.2 GM agency - tensions of accountability and acting otherwise.

In addition to compromise, compliance and positive facilitation of the strategic initiative to centralise revenue management, there is evidence of negative attitudes and resistance to this strategic initiative, where there are contests of accountability and power in the implementation of strategy. Resistance (or deviance Lugosi 2019) should not necessarily be viewed in a negative light, as such resistance (i.e. acting otherwise in Giddens's terminology) could have beneficial impacts, so it is important to analytically separate the actions and outcomes of agency in this study.

Although generally well received by GMs, the centralisation of the revenue function presented some contradictions and difficulties for GMs. The ensuing series of examples reveal and explore the agency of middle managers navigating power asymmetries, tensions of control and accountability, facilitating communication and mediating expectations, in addition to bridging local and temporal factors. As the strategic change is implemented, agents in the field must redefine their role and negotiate new relationships in the field, in order to deliver the optimum pricing decisions in a time bound temporal setting and important competitive context. These critical decisions require the agents-in-focus to position themselves to provide a bridge between the demands and expectations of central revenue and the local priorities and realities of the unit. The issue of accountability plays into the evolution of roles and responsibilities embodied in the GMs position practice and the new role of CRM, for example where power resides, which is one of the three modalities of structuration (Giddens 1984).

One of the recurring themes in the data is that although the revenue function has been centralised and that these specialised revenue managers crunch the data and make recommendations about rate strategy and what business to take, importantly accountability still remains at Unit level.

At the end of the day everything is on the GM's head. Regardless if you centralise revenue, when you don't make your room revenue, they don't call the cluster revenue manager and say "why are you £20K short on rooms?" they call the GM and say "why are you £20K short on rooms? (Nigel) [25.46] [Tapping the table with pen to emphasise the point]

This clearly shows that although potentially shifting relations, this initiative does not change the position practices, or role, of the GMs when it comes to accountability for unit performance. But it does externalise power over information, GMs have to navigate the strategic terrain both locally and remotely to deliver optimum performance for their unit. Agents conduct analysis will reveal that GM's attitude to this change, it is likely this varies according to their personal dispositions, experience, their position in their career and their career aspirations. It is their own motivations, skills and knowledgeability that will guide their agency, in terms of ordering their concerns and establishing a hierarchy of purposes.

At the heart of this change is a view about where skill, knowledge, power and agency should reside. Should revenue management function remain in the units or be centralised regionally? Neville felt that this would not have been necessary if the correct skills and experience resided in the units,

And I fully agree with centralisation and the benefits that we see in the hotel, in terms of best practices and the skill level of the people who are in our Revenue operation now, is superb. But if, as general managers, we were recruiting the right people into the business as revenue managers, there should never have been a need to centralise. It was the ... poor performance of the few that drove the change in my opinion, sadly. (Neville Interview) [57.50]

Robert acknowledged that part of the drive for the restructuring of the RM function was "dealing with the skills shortage in Revenue Management. We made some revenue managers redundant in the units and some became revenue office managers (ROM) in the units" (Robert Interview) [10.41]. This was a strategic response to this rapidly developing area of hotel operations, where skills and experience is often lagging behind technology and market developments. The issue of skill feeds into a narrative and change of the role of GMs which will be picked up later. Although on reflection Neville was generally positive about RM centralisation, his diary logs revealed conflicts in the operation of the central revenue function advice and service.

Several GMs recounted issues associated with regional RM offices and the ability and availability of staff and the analytical capability of the centralised revenue function. One GM reported response times and dissatisfaction with the service levels provided by Heathrow. In the context of a very competitive market and the need to respond to group pricing queries quickly, Grant explained that he shared a CRM with three other hotels, if he needed a quick response and she was in scheduled regular meetings, nobody else could provide a rate.

We have a turnaround time of an hour for most of our ... for a lot of our enquiries, yeh? (pause) So for example, for meeting rooms or something like that, they would have a 1 or 2 hour response ... I mean it is getting tighter. And if you ... and the thing is it is ... you cannot reply after 3 hours because you are not on the deal, you are wasting your time you know. So if they [CRM] are in a meeting there is no brain there to get the decision they need. That can be quite frustrating: that kind of thing can be quite frustrating. [22.59] (Grant Interview)

This GM experienced challenges with the responsiveness of the CRM and was unable to provide what he considered to be timely reply to booking requests in relation to meetings. There is a spatial and temporal dislocation for the GMs and staff in the units, the locus of decision making is now removed from the unit and the rhythms of the CRM function are subject to multiple pressures and demands, meaning they are not always able to provide rate information when needed by the unit. Here the temporal rhythms of the central office are not aligned with the real time (time bound) nature of operations and decision-making in the unit.

Freida also recounted the loss of control, and issues associated with knowledge and skills of the Revenue Managers at Heathrow. She also reported a tension between priorities and targets for RevPAR and TRevPAR. By moving the revenue management function out of the unit, there is a diffusion of GM power, the GMs no longer recruit and directly manage these key revenue staff, they have to share those staff across several units. RM staff in the central office report to Regional Revenue and look after up to four hotels. This reduces the GM agency as they are less able to influence the ordering of priorities of the other agents in the field and align these with their own. Here it can be seen they will have less power over *authoritative* resources (Giddens 1984) thus reducing their agency. This has implications for the GM's role and position practice relations.

Because our Revenue Manager is based in Heathrow, is purely focussed on rooms management and rooms revenue. But I as a GM am targeted on TrevPAR so I am now having to try and link all the different parts of my business. He just could not understand that it wasn't just about rates. Because if it was just about rates then I don't have people here having breakfast. I don't have people drinking in the bar.

And... And this Revenue Manager, he struggles sometimes to see that we also have meeting rooms to fill. (Freida Interview)

It was a recurring theme that GMs recognised there were varying levels of service and expertise amongst the Heathrow team, Grant noted that "Ours is competent. But I fear they may not all be competent!" (Grant Interview) [24.16], with some GMs acknowledging they were 'lucky' to have a good relationship with their CRM. What is evident from the GMs testimony, that in different ways according to their own capabilities (ability to draw upon rules and resources embedded in internal and external structures) GMs are navigating new position practice relations as a result of the centralisation of the revenue management function. Each GM has individual experiences and responses in this regard. Position practices comprise amongst other elements, identities, obligations and privileges, power relations and reciprocities (Cohen 1989; Stones 2005), it can be observed in this data that the centralisation of the revenue function has changed these relationships and as a result GMs agency is affected and also changed.

A reflective log from Neville revealed the challenges associated with implementing this strategic initiative, which related to resources (both allocative and authoritative), here again service level in the central provision is implicated. Neville recalled and reflected on a quarterly revenue meeting with the CRM and her Senior Revenue Manager in Heathrow, where the unit team (consisting of ROM and GM) wanted a much more granular approach to managing corporate revenue. The context for the meeting was "all in all positive .... we were seeing a continued trend with corporate business coming back in terms of volume" (Neville Log). However, the unit team wanted to take a very detailed look at the business, the distribution channels and where and when the business was coming in to the unit, to enable

us to apply the right controls and to accept the business ... or the correct business by channel on the excess demand days and make sure we are not restricting bookings on the high and low demand days or the shoulder nights. This caused some conflict as we were querying and challenging what controls were available in the Revenue Office? (Neville Log).

This granular approach to controlling corporate rates individually, initially seemed not to be possible, but “it turns out that is possible ... but with 60 accounts this would require 60 controls for every night of the week ... So that obviously wasn’t possible in terms of resources available.” (Neville Log). So, this conflict arose around the issue of resources, the inability or unwillingness of central RM function to respond to what the unit considered to be a “reasonable request”. The GM reflected.

That was an interesting discussion because there were different agendas: Revenue office, CRM and Senior CRM were also concerned about resources. ... There was a feeling from the hotel side that there was a little bit of laziness in terms of the controls and the restrictions and the strategy that was being implemented by the Revenue Office. (Neville Log).

On reflection the GM noted the encounter revealed that there “are additional things we can do to maximise revenue on key and excess demand days. And we had a good open discussion about the controls available and what is reasonable for the hotel.” (Neville Log). Here, the GM lacked the necessary allocative resources to pursue his local agenda. In the end compromises were made and controls were applied utilising length of stay (which is easier and quicker to apply as a control),

agreeing what we can do short-term, mid-term and long-term to overcome the challenges of resources. And to put in place the trials to make sure that the controls and strategy changes that we were discussing do actually deliver additional revenue. So that we can then review our resources correctly and go forward for the rest of the year. (Neville Log).

This micro episode is an example of the many that require the GM to mediate between different position practices, to find solutions. In these position practice relationships, power asymmetries exist, but also rights and obligations need to be acknowledged and/or adapted. Ultimately the cluster revenue office must deliver a service to the unit, but within their own budget constraints. Meanwhile the unit GM is incentivised to maximise his unit’s GOP and thus much more focussed on achieving maximum total revenue. In the context of this dialectical interaction (similar to that found by Seal and Mattimoe 2014), the GM demonstrated his active agency by pressing the boundaries of the service obligations from cluster RM, drawing on his authority as GM, and by offering potential way forward he changed the reciprocal interactions embedded in these evolving institutional practices.

It is important to recognise that each GM, being an individual with different capability and knowledgeability, will react differently to these strategic initiatives depending on their personal dispositions, their knowledge of the external structures. Some GMs were much more assertive with the RM team and take much more proactive and assertive position, whilst others resist more quietly and covertly or are even more passive. One GM admitted,

I am sure that my Cluster Revenue Manager thinks that I am a right pain in the rear-end because I challenge her on everything every day, wondering: Why isn't this? Why isn't that? When are you going to give me this? How are you going to give me this? I don't believe in what you are saying here. I want it this way. [1.04.51]

I ... I dare say that I don't think there are any other GMs that are as particular in that respect as I am. (Jeff Interview) [1.05.12]

These excerpts demonstrate the structuration processes at play as roles and relationships are renegotiated in action and new institutional practices are established. There is a compromise in the responsiveness of the RM analysis and decision making but there is an associated nuanced change in the GM and unit roles and agency. GMs are mediating these changes pragmatically as the central revenue function becomes a more established institutional practice. The following two vignettes (from Gordon and Jeff) demonstrate the different approaches to exerting agency and yet a common rationale and ethos underpinning these approaches. Adopting Stones' composite research strategy supports the analysis of agents' conduct and context analysis, to reveal how GMs implement strategy, this next excerpt provides a detailed exposition of Gordon's active agency in the context of the closure of a corporate rate band.

Gordon provided a powerful example of resistance in relation to revenue management decision making, revealing when data driven decisions can be, and should be, over ridden by local knowledge and accountability. Data recorded in a diary/log from Gordon, recounts a revenue discussion with his team and the need to comply with rates being offered by the expert system SNAP. SNAP is an algorithm driven rate recommendation tool that draws on all local competitor rate information on OTAs and other distribution channels and positions the unit's rates in this context, also taking into account the current and target occupancy. The strategic context is such that regional head office is having a 'push' on compliance to SNAP, in this context the GM and his team are considering the rates. The GM receives a call from a corporate client who cannot get the rate through central booking that they were expecting, as all corporate rates have been raised in line

with SNAP, and this segment is closed out. The GM must make a decision, to hold to the recommended rate and loose the client or override the system, (be non-compliant), allowing the corporate client to book at a lower rate. Gordon's attitude, or general dispositional frame of meaning (Stones 2005:123), to SNAP was somewhat cynical.

For me as a general manager, I think SNAP works well for .... however when it comes up with £300 rate when the competition are all on £190 to £200. I can't justify it, I'll change it. But there's also on the other side, you've got keep your core business happy and where central are telling us, "no, no, you need to push, drive, drive, drive, rate", so you drive the rate on one side, but you have to balance it on the other, without upsetting your loyal, loyal corporate guests. [Gordon 5.44].

As noted before the relationship between the units and the centralised RM function has a dialectical quality, although ostensibly driving towards the same organisational objective, they have different temporal and spatial imperatives. Cluster RM servicing multiple hotel units across several brands in the region for HotelGroup, versus the GM and his team facing clients in the confines of the hotel on a daily basis. This arguably leads to different priorities and rationales for action, GMs testimony in this research reveals a 'heart and head' logic and with a strong emphasis on people, where ethical dilemmas are common place. This GM's testimony reveals his own conduct analysis and dispositional frame.

for me, for me ... it's about the history of the guest you know for instance the people we are talking about [corporate client name], they have been coming to the hotel since it opened. They have been loyal to the hotel since it opened if we were now to shove them off, and they don't come back, where does that leave us for the future? (Gordon).

Strategic context analysis reveals this agent's understanding of the strategic terrain and the external structures of power and sanction, "from the perspective of his own project, role or task" (Feeney and Pierce 2016:1162). This GM decided to act otherwise, in the knowledge of the consequences of action, taking calculated risk, to take a decision which, in his own interpretive scheme and dispositional frame, was the *right* decision. Such decisions do not come without consequences.

Oh, I, I think if, if I was to be confronted by my, (inaudible) controller, on that particular issue, I would get into trouble for it, I'm sure. Because they look at it purely from a numbers point of view and not ... from a (pause) I think further on down the line, their [regional head office] aspect, what is right now, ... must take as much as we can right now. My personal view is that, if we upset the them [corporate client name] now, in the future, then it will be more difficult

to get that business back, and we become as unreliable as ...[ pause] .. hell if you like... [9.12] (Gordon)

This is an example of an agent acting otherwise in the context of a strategic initiative and displays active agency. For Gordon the horizon of action (Stones 2005) is long term, these decisions set the rate for the year so have large cumulative effects on revenue, the revenue team in the centre are operating against monthly and annual targets, but the GM knows that these clients have been loyal to the unit since it opened, so is considering this decision over a much longer temporal horizon. It can be interpreted here that this resistance was also embedded in cultural norms associated with the organisational culture to put the guests at the heart of the 'service ethos'. This institutionalised understanding of priorities is embedded in the culture as an external structure and embedded in the role of a GM through his conjunctural knowledge and the position practices associated with this role. The role of culture in middle manager agency will be discussed in more depth in section 5.4.

This example also reveals the importance of *critical distance*, as Stones points out, "it is important to include Mouzelis's points about the varying levels of critical distance that agents bring to the internal structures that are the medium of their actions" (Stones 2005:102). This is evidenced in Gordon's testimony.

I really think that is experience in the job, because if you had asked me this question a year and a half ago, or 3 years ago, I would have said I would have said, 'Let's stick with the party line', because I would not have been as confident of my ability, if you like, umm in making that decision. Now that I know the market a little bit better, and by no means am I an expert, what so ever, but I have enough of a urhh, ... these customers, these guys who are staying, these are guys who are coming in week after week after week, staying in the hotel. Although, no they're not the richest guest that we have, they are certainly the most loyal, and the rate is still pretty good. (Gordon)

In the extracts above the agent-in-focus (Gordon) clearly reflects on his own learning and experience gained over time that gives him the confidence to resist the system, drawing on his conjunctural knowledge and general dispositions. With clear knowledge of expected sanctions, he exerted his power as a GM to not comply with the 'machine'. In this case he articulated a clear rationale, demonstrating his own interpretive scheme, his own narrative of resistance, providing legitimation for his actions. This demonstrates alignment with Stones' view that, for an agent to resist they require all of three key properties; adequate power, adequate knowledge and "*critical distance* in order to take a strategic stance in

relation to a particular external structure and its 'situational pressures'. [italics in original] (Stones 2005:115). Substantively, what is observed here is an example of resistance in strategy implementation and evidence of unit GMs power and autonomy. What is interesting is to see the emerging theme of when and why GMs resist, in this example it was an ethical drive supported by a business logic.

Other example of GMs capability to act otherwise and reject corporate guidelines relating to the strategic implementation of revenue optimisation is revealed in the following account. In this account Jeff relayed his choice to ignore guidelines with a clear justification for and self confidence in his own decision making. This revealed his knowledgeability of the strategic terrain and his capabilities to draw on cultural resources. Discussing GM autonomy and discretion and the degree of freedom to make decisions in what appears to be a very tightly controlled management environment. Jeff spoke candidly in the interview to state,

I am not a cowboy. (leaning forward adding intensity to the point he was making) But if I feel that something would be right ... I want to do something with it as long as it is within reason. I don't ask permission, I just do it and then I show the result afterwards. I am still here, and it has never been a big issue and I have nothing ... I have no blemishes on my file after 12 years with the company.

He continued...

If I wanted to do something that I commercially think is right, for the hotel, which is within reason and I am not breaking any laws or totally sabotaging the brand guidelines, you know, then I will do that. (Jeff Interview) [1.00.33]

His rationale for resistance (narrative) was grounded in business common sense and knowledge of his unit. As has been the case in many of the GM's testimony, they act with knowledgeability of the structural rules and resources, embedded in the organisational culture and strategy, manifest in the 'Service Ethos' and the BSP (Business Strategic Plan). He went on to provide an example a situation where he acted counter to established recommendations and rules for rate setting in relation to corporate business. "Guidelines came out when we were doing our corporate contracting, that we shouldn't contract anything other than standard rooms" (Jeff Interview) [1.01.22]. Knowing his local corporate clients, this GM believes it does not make sense to refuse his corporate clients the higher rated rooms. As a knowledgeable agent, he will draw upon his understanding of the strategic terrain and the power structures, the obligations and responsibilities of his role

to act otherwise. By ordering of priorities putting guest satisfaction, unit profitability ahead of compliance to a system edict from the centre. He has a different set of temporal and spatial considerations to regional revenue office, understanding the unique characteristics of his unit and his client base, and with the benefit of experience in the role, he decided to act otherwise, to resist strategic initiative. He continued to justify his actions,

They [the customers] have asked for it and I have given it to them. They are paying the right rate. The proof is in the pudding. There are months this year when I have grown our average rate by 25% over previous years. We have maintained occupancy. (Jeff Interview) [ [1.01.43]

The outcome of agency here is to breach the guidelines, in full knowledge of the strategic context and balancing in-situ priorities, this agent acted otherwise. Reflecting on accountability and control, he relayed his confident rationale for acting otherwise, what could be characterised as his narrative of resistance grounded in the BSP and the Service Ethos. What can be seen here is an example of accomplished and knowledgeable practice, grounded on internal structures, which reflect the norms, values imbued in role (position practice) and the organisational culture. Clearly recurring in the data is a rationale for action grounded in the Service Ethos and the BSP which provide the ‘logics of action’ in this context, reconciling strategic instructions with unit-based targets for customer service and profitability in the BSP. Arguably this is a GM acting as a GM.

Ultimately GMs are responsible for the performance of their unit, they have high degree of power based on their role and position practice. They bridge the external structures and their active agency drawing on their general dispositions and habitus to stand up (in this case) to CRM when they believe they are right. Jeff continued, “at the end of the day, if I don’t agree with her [cluster revenue manager] I tell her ‘this is what I want: this is what I get’. [1.03.05] ... I am still responsible for the hotel.” (Jeff Interview). This agent demonstrated personal capability and knowledgeable ability, drawn from years of experience in the organisation, and personal dispositions including work ethic and self-confidence and a strong business orientation. Importantly, he was *capable* of drawing on the external structures embedded in the role of GM, to exert power, legitimise his behaviour and reconstitute norms associated with the rights and obligations of his position in this new network of position practice relations. In the context of strategic imperative for revenue optimisation, he made a business focussed decision to resist edicts from region and act otherwise, he is self-aware of his own standing and experience, and he has the necessary

social capital and understanding of the cultural norms to resist and to ‘act otherwise’. In both these cases (Jeff and Gordon before), these agents-in-focus demonstrate adequate power and knowledge of the consequences of their actions, whilst engaging in innovation and improvisation in the process of strategy implementation.

The diary logs from Graham in Cardiff reveal another challenge of a centralised remote critical professional service in this multi-unit service organisational context. This example reveals agency of a very different nature in the form of Graham’s navigation of the interpersonal battles associated with external hegemony. In this example the agent draws upon internal structures in the form of norms, interpretive schema and the power conjunctually-specific to his role. In the context of the same centralised revenue management system, this demonstrated a very different kind of agentic behaviour. In this situation, the agent-in-focus was involved in skilful mediation, driven by motivations to ensure the team dynamics were maintained, in the face of dialectical power dynamics and conflict within his team. In this case his clearly espoused dispositional frame guided his actions and resulted in the enactment of strategic intent. As explained above, the centralised revenue management function is situated in Heathrow, this is geographically remote from many of the units and the staff do not possess local knowledge, rather they are analysts with excellent data handling skills and dynamic pricing logic. In the context of this fast-moving technical function of hotel operations, where machine learning and algorithmic rate setting programmes are critical to maximising revenue, the forthcoming vignette is extracted from a diary log from Graham in Cardiff.

The context for agency is a regular revenue meeting which took place in the unit, present was the GM, the core team Reservations Manager, Director of Sales and the Cluster Revenue Manager (CRM) (via on the telephone from the remote revenue centre as is often the case). The meeting was part of the Daily Revenue Call to set rates for the next 120 days., in focus was the month of July which was ‘pacing behind by £30,000 to date’ (Graham Log). It was agreed in the light of pickup and market performance a change of strategy was appropriate, his log reveals “it was agreed collectively that we would work on an occupancy strategy rather than rate development, in order to ensure that RevPAR was able to be obtained.” (Graham Log). Conversations in this meeting progressed to focus on July and a sales promotion being proposed by regional head office. The unit-based team were sceptical about the efficacy of this proposal, because they felt the rates

were too low and would erode profitability of the unit. The GM shared this concern in the meeting with the cluster RM, an extract from the diary log continued.

While it was understood that this sale would support the revenue development for the month, she equally did share the concern of the conversion<sup>6</sup>, however, was assured that the conversion would be ok if the rate was set at £79. Following this, the question then led to a conversation. And at this point the meeting subsequently went a little bit quiet. Whereby there was a slight element of defensiveness coming from [Cluster RM] – based off-site and on the telephone. I had expressed my concern that if the rate was at £79, once we had gotten to net rate stage, there would be very little money left. The response to this point was that [Cluster RM] was fully aware of how to do her job and form the calculations in order to ensure that the rates were profitable. (Graham's Log)

The log revealed that the meeting continued to discuss other business, but with an obviously cooler tone and atmosphere the Cluster RM agreed to send all her calculations in relation to the July rate (as the unit team had no access to these figures) and the Unit team would delay implementing rate. The following day the calculations revealed that breakfast was excluded from the rate, a fact that was not clear to the unit team earlier, this explained their position the day before. The GM reemphasised that the unit team did have faith in the Cluster RM and respected her knowledge and experience, and the Cluster RM acknowledged that the sales promotion communications had not been clear, so the unit team's misapprehension was understandable.

This mundane micro excerpt of life is typical of the daily meetings that GMs are involved with; they have to maintain equilibrium in a real time complex service organisation. In this case, the agent-in-focus demonstrated several of Stones (2005) aspects of active agency. There were interpersonal issues to address, conflict between different position practices, power asymmetries and time bound decisions. The GM agency involved diplomacy, meaning making, mediating the 'outsider' dynamics and navigating the team to a difficult and performance-critical decision. He was motivated to maintain good working relations, critical to effective function of the RM. With critical distance and reflection, the GM felt there should have been more preparation and full information for all parties, the outcome is that for all future meetings, pre-information and calculations would be provided for all proposals of this nature. This agent-in-focus was aware of the position of the other agents

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<sup>6</sup> Conversion in this context relates to the GOP conversion, i.e. the profit generated from this revenue.

in context, sympathetic to the network relations, but drew upon his power and authority to delay the decision (thereby “shifting the horizon of action” Stones 2005:101). He drew upon interpretive schemes, his understanding of the culture of the organisation and his own general dispositions to help makes sense of the situation and restore ‘face’ for all concerned (Goffman 1959). The outcome of this agency was a rate decision that all parties were happy about and good team dynamics. This may appear to be a minor incident, but it is arguably one of thousands of such critical incidents the build into praxis and facilitate strategy implementation.

Another example of the GMs day-to-day experience of the implementation of centralised RM function and the relationships between the units and the revenue team in based in Heathrow, is provided by another participant’s diary log. This log is a fatalistic reflection of the ‘other’ by Grant, although short it reveals the tensions and conflict within the system. Although this diary log did not reveal specific decisions taken, it did provide a window into the local challenges and the strategic terrain. Grant recounted the situation that with reduced capacity due to refurbishments the budget expectations were not being met. The unit team were being held accountable, but they did not have control. This is another example of the network position practice relations for the agents in situ and the power dynamics between unit and central revenue management team. In this case the GM felt it was unacceptable that the cluster staff continue to press the unit on occupancy whilst seemingly having no knowledge of the refurbishment, let alone its likely impact on revenue;

we are under pressure because it is suddenly a surprise that we are having a refurb. ... and that is quite strange. And it is even more bizarre that there is no acceptance that through our loss of rooms there will not be an impact on our revenue. (Grant Log)

This reveals a lack of communication and understanding between the unit and central revenue function. In this situation the active agency of our GM is steered towards reflecting on his own role, (his conjunctural knowledge and general dispositions) with the benefit of critical distance he reflected;

I think in terms of my need to do things differently we should probably have banged the drum louder and earlier about this situation in January. I felt we had communicated the situation, but it has not obviously been heard from above. (Grant Log)

Here it can be seen that the GM is engaging in middle manager practices of diplomacy and communication, facilitating the effective implementation (Floyd and Wooldridge 1992) of the strategic centralisation of the RM function, but also this analysis reveals previously unreported detailed agency and the duality of structure and agency within the strategic context providing a more complete view of MM's agency.

To summarise, the strategic implementation of the centralisation of revenue management in HotelGroup was driven by strategic imperatives to capitalise on big data and new analytics, but also to address skills shortages in the units in relation to revenue management. It resulted in the reallocation of resources, changes in position practices and affected the agency of GMs in a variety of ways. The examples above extracted from the rich data set reveal the manner in which these middle managers navigated this strategic change and its impact on their role and their agency. Structuration theory has shone a light on the processes of strategy implementation, and utilising Stones' SST (2005) has revealed the five aspects of active agency, including, shifting horizons of action, improvisation and innovation, degrees of critical distance and reflection, motivations for action and ordering of concerns. These GMs' active agency involved mediation, navigating compromised team work and differential resources (e.g. Neville), and interpersonal power and information differentials (Graham).

Some GMs experienced loss of control over authoritative resources (Frieda) and spatial and temporal dissonance (Grant). Resistance was observed associated with active and passive agency driven by local knowledge of the strategic terrain and ethical motivations (Gordon). Agents' motivations for action were grounded in a business logic in addition to personal dispositions and conjunctural knowledge of strategic priorities, expectations and power relations (i.e. structures of signification, legitimation and domination). The ability of agents to act otherwise is mediated by their own assessment of the strategic terrain (the context for action) and their own hermeneutic reflexivity (conduct analysis) influenced by their own sense of personal social and intellectual capital.

There have been very few, if any, similar structuration studies published relating to strategy implementation and even less in the SaP field. One similar structuration study, Feeney and Pierce (2016) focussed on the role of accounting information in new product development

and did not take a SaP approach. The research was situated in an engineering industrial context and found that the manner in which individual actors engage with external structures “depends on that individual’s internal structures (Feeney and Pierce 2016:1163). Similar to the findings above, the internal structures of agents are constantly “interacting with a web of position practices” (2016:1164). In this study (similar to Feeney and Pierce) agents-in-focus demonstrate strong commitment to the business objectives of HotelCo, in this case revenue maximisation and customer satisfaction, but dispositional factors affected the manner in which the GMs took day to day decisions, ‘resisting’ or adapting strategy when it clashes with their ethical and/or dispositional stance.

The review of SaP empirical literature revealed only one author whose work is proximal to the research in this study (Mantere 2005; Mantere 2008; Mantere and Vaara 2008). These articles were based on a single large collaborative study involving four academics, 301 semi-structured interviews of which 83 were with MM from twelve organisations in four sectors. Drawing on Floyd and Wooldridge MM role activity and utilising an abductive process, Mantere (2008) developed eight enabling conditions related to top managers agency, from a middle management perspective. He defined and identified strategic champions revealing tension between recursive and adaptive practices (Mantere 2005), he argued for a reciprocal view of strategic expectations (Mantere 2008), and with Eero Vaara, found six social discourses impeding and promoting participation in strategy processes (Mantere and Vaara 2008). The findings presented here are different, because they take a closer view of individual agency through the focus on day to day incidents and provide a much more detailed perspective on agency. Thus, it can be seen that a practice perspective on strategy implementation empowered by the lens of SST can reveal otherwise unreported detail of how middle managers implement strategy. In this way the utility of SST has been demonstrated in line with objective 4 of this study. The excerpts and vignettes above have revealed *how* middle managers navigate the strategic terrain and make decisions and then take actions to implement strategy. In the process of analysing these data one interesting and unexpected theme emerged which will now be presented.

5.3.3 Middle Managers' Strategic Agency – Micro-buffering

The data presented thus far has provided a detailed account of MM agency in strategy implementation, showing how GMs navigated key strategic change initiatives and the structuration processes impacting on their role and their agency. Although not the intention of this study, an emergent theme has been observed showing a new kind of managerial agency, a managerial role not formally presented or discussed in the generic extant literature. This has been characterised as buffering; in a thesaurus buffering synonyms are protecting, defending, safeguarding and shielding. The data revealed GMs enacting these types of behaviours on a regular basis, both in relation to strategic initiatives and every day operational life. This nascent idea will be contextualised within the extant literature before being developed and illustrated drawing on data from the GMs interviews and diary logs. Much of this extant literature emanates from a very different ontological position to that adopted in this study, consisting of mainly normative theories, often grounded in hypo-deductive studies. However, it is still important to reflect on this body of work to show the space where these promising findings can be positioned and potentially make a significant contribution to understanding.

From a perspective of the orthodox extant literature, the findings presented thus far reveal a range of integrated managerial role behaviours in great detail. The purpose of this research was not to characterise or map the content of managerial work (Mintzberg 1989; Shortt 1989; Nebel and Ghei 1993; Mantere 2017), however, emergent within these findings is a nascent idea which is different to and complements the current understanding of managerial work. This idea, typified as Buffering, is best previewed in the context of the orthodox literature that is represented by the work of Mintzberg (1973; 1990) and Floyd and Wooldridge (1992; 1997) (discussed in the literature review) and others who have drawn on these seminal studies (Nebel and Ghei 1993; Chareanpunsirikul and Wood 2002). In the data from this study it is possible to track managers enacting interpersonal, informational and decisional roles (Mintzberg 1973) within a single micro episode of strategy implementation. For example, in one single micro-episode (described earlier) Graham demonstrated all three categories of managerial roles. In the context of a contested room rate discussion between the unit and the CRM, he provided leadership and liaison, monitored impact of the rate proposal, spoke out for the unit's position and negotiated interpersonal dynamics for his team.

From this single event the accomplished and complex nature of agency is revealed and the integrated nature of managerial roles is evidenced. As Mintzberg (1990) himself acknowledged these roles cannot in reality be separated, so examples also reveal simultaneously enactment of several roles. It has been shown that there is much more to these knowledgeable agents than such normative frameworks can reveal (Hales 1999; Willmott 1987). Mintzberg (1990) himself acknowledged there is another face to managers, “in contrast to the long-dominant professional or cerebral face” he introduces what “I like to call.. the insightful face” (Mintzberg 1990:8), implying a different way of ‘knowing’, accepting the lacunae in his earlier work. This is neatly demonstrated by an example from Grant’s testimony. In the context of dealing with a difficult situation he explained how difficult it has been and how he had drawn on the cerebral and insightful faces (to use Mintzberg’s terminology). This very short extract from the interview transcript includes interviewers notes in brackets, “Yes – yes. Navigate from here ... navigate from here. [pointing to head and heart] (Grant Interview) [59.40]. This is clearly visual articulation the dual facets of managerial work as described by Mintzberg. Another GM acknowledged the need for intuition and sensitivity in relation to interpersonal relations associated with remote CRM function. All units have regular revenue conference telephone calls with their central revenue manager (CRM) he demonstrated his insightful and empathetic understanding of the dynamics of such situations.

And now you are dealing with somebody at the end of the phone dealing with a Web Conference ... and let’s say something funny happens to happen in the office. And then there is a little bit of a giggle in the office and then the other person on the phone are alienated from that situation and they don’t really understand the personalities because they don’t know the people and understand how we interact. And then it all of a sudden goes very quiet at the other end of the ... ‘are they talking about something that I just said?’ (pause) whereas somebody just dropped the coffee over them and it was kind of one of those silly situations. (Graham Interview)

Most managers demonstrated, or rather blended, the cerebral and the insightful ways of knowing (Mintzberg 1990). The purpose of drawing attention to these categorisations now is that the emergent, but nascent, facet of managerial behaviour emerging in this research appears to be different from these classic roles. It is arguably similar from a superficial perspective to Floyd and Wooldridge’s Championing (1992; 1997) however, Floyd and Wooldridge’s categorisations were generally more focussed on agency at a meso level. Their’s was a broad study drawn from data across 25 manufacturing and service

businesses, that was pitched at organisational level actions. Agency in their model is directed to business activities, for example, justifying and defining streams of activity or projects, communicating market and product development options and translating “goals into action plans” (Floyd and Wooldridge 1992:160) hence the use of meso in this context. The agentic behaviour is not directed towards individuals (micro level activity) but at streams of business or divisional units (the meso level) within a broader organisation or sector context (the macro level). However, in this research commensurate with an industry context where people are a fundamentally important and a service orientation is a key part of the sociocultural milieu, the agency is different. Agents in this study demonstrate agentic behaviour of ‘buffering’ directed towards people (usually subordinates), they display micro level actions directed to other individuals at a micro level. So, this form of emergent agentic behaviour is different to the roles described and applied in much of the extant literature, even those studies that developed and extended Mintzberg’s roles such as Brubakk and Wilkinson (1996a).

This notion of buffering emerged during the data analysis phase. A recurring theme started to materialise, where GMs explained or reported their actions in relation to members of their team. This initially appeared to be part of a pattern of communication and coordination activity in the context of strategy implementation (which generically it is), but data revealed middle managers going a step further to alter or modify strategic initiatives to protect or mitigate the negative impact on the unit-based team. Utilising Stones’ composite research strategy started to reveal the motivation for action, the agent’s conjunctural knowledge and general dispositions, and this revealed a protective or shielding aspect to the behaviours and actions of the GMs. In the context of redundancies and restructuring it is difficult to resist strategic initiatives and act otherwise. Many GMs recounted very difficult circumstances where although they knew they must implement the changes required, they acted to mitigate the impact through a range of measures, including recalibrating their HR team, changing the timing delaying the impact, or merely taking extra care to support staff, this buffering behaviour was often selfless and difficult, but also it was sometimes mundane and operational.

Neville recounted how the cost cutting associated with a previous consolidation exercise that took out layers of management and lead to the centralising of RM and the clustering of HR and Finance. He regarded these strategic impositions as difficult to manage at unit

level. This verbatim quote reveals the difficulty of the situation and the impact on the units and the GM role.

And we expected everybody to step up whilst we made a saving. Ethically ... (pause) ... I don't agree with it. I didn't agree with it at the time. And we took some big risks. We centralised our HR: we took HR out of the hotels and we devolved that to the HODs who weren't HR experts. And overnight we expected to skill them and give them the time; at the same time as taking away the leadership. [54.55] ... (pause) Very, very difficult times ... (pause) And ... but the commercial reasoning was that we were fit enough to survive, and we didn't close many doors in terms of our own businesses. But I think our ethics were questionable. [55.12] (Neville Interview)

Understanding the strategic terrain, and the powerful macro forces affecting the business, shifting his horizons of action, drawing on his role and position practice as the business leader in his unit, this agent acknowledged an imposed reordering of priorities. With the value of critical distance this agent clearly reflected upon and articulated the tension between his values and ethical standards and the hard realities of necessary business continuity.

In the context of this very difficult strategic terrain GMs continued to demonstrate protective behaviours towards their unit team, which is replicated in several GMs interviews. Many GMs adapted, delayed or manipulated strategy implementation to protect the unit-based team, the following examples demonstrate this agency. When discussing some difficult changes and forthcoming redundancies, Gordon described it graphically,

I think when you talk about buffers: yes there is this giant buffer that sits there waiting for the lift to fall and it stops the lift from falling. I am the buffer between the lift falling on my staff's head and you know... So I would rather take it than give it to the staff. I want to tell the staff in my own way, because I have a relationship with my staff. (Gordon Interview) [46.38]

Although it is usually not possible for the GMs to reject or resist many of the cost cutting and restructuring redundancies, they try to mitigate or reduce the negative impact on their unit-based team. They can do this because they are the gatekeeper of the unit, all strategic initiatives are communicated through them and only them "Yes I do because everything comes through my office" (Gordon interview), he continued,

if I was to follow the corporate line it could be more of an upsetting process than it is already going to be. Whereas because I have a relationship with my team, and my team know me, and we have that repartee if you like, I can put

as many curves on a really unpleasant situation as possible.” (Gordon Interview) [47.32]

Particularly in these circumstances GMs have restricted agency, for example they often cannot always change the timing of when things happen, they try to soften the message and support the team where they can. This GM acknowledged that this was not least the right thing to do and an important mechanism for coping, “for me that is how I get through.” (Gordon Interview). The agency can also be seen as a ‘protective device’ seen in others’ testimony, this buffering helps GMs cope with delivering difficult decisions and enables them to maintain their own equilibrium or ontological security (Giddens 1984).

Jeff also had to implement redundancies linked to an earlier round of restructuring, in the context of a discussion about GM autonomy and when GMs may need support (and sometimes) approval from the regional office, he relayed the difficult circumstances of implementing a series of redundancies during the recession. In this case there was a member of a cohort of staff who were to be made redundant, he was of Indian origin had been working for HotelGroup for 5 years and was only four or five months away from achieving permanent residency. Jeff was troubled by the consequences for this person, “do we really want to end his career, you know, and send him back to India? Because then he can never come back again!’ And, of course, we decided not to.” [16.57] (Jeff Interview)

Things like that. That is when you need the Regional Director’s support. Because that wasn’t the ethical way to do things. It wasn’t the way we do things at HotelGroup. Yes, - it is a black-and-white thing, but then we would have been creative and find a different way of solving the problem. Because this wasn’t the right way of solving the problem. And when you are new, and you don’t really know how extreme you should go, that is when you need the support for these decisions. (Jeff Interview1)

Through his agency, Jeff was able to keep this person in the business and country.

He works for us still, but not in this property. He works for HotelGroup in Southend on Sea, you know, in the new [other HotelGroup Brand] there?”  
So, we found him a new job, and a promotion etc. etc. (Jeff Interview1)

This GM’s intervention was motivated by his personal disposition and an ethical value set, he understood the strategic need to cut labour costs in the context of a reduction in business across the sector, but he was motivated to protect and defend the employees who worked in his unit, and act in their best interests where he could. This required him to

uncharacteristically seek support and approval from his regional line manager. This is an example of a GM adapting or changing the implementation plan for a key strategic initiative to buffer people within his team.

Frieda recounted an example of when she resisted regional hegemony to try and retain a team member, who was unable to sustain the new work demands following restructuring. In this case the Sales Manager in the unit team felt the increased work demands were not sustainable in the context of her home life and responsibilities. This GMs automatic reaction was to use the established HR procedures to try and find a resolution to allow the person to stay in her role, by making adaptations to working patterns. This provides example of both resistance to regional requirements and buffering of staff in the face of a strategic initiative.

I have an example of my Sales Manager here, resigned last week because she can't ... she can't manager her workload on the hours that she ... sorry ... she can't deliver the expectations of the role because of child care issues. So we offered her flexible working, or an opportunity to submit a flexible working request to see whether we can maybe try and accommodate her situation. We didn't want to lose her form the business if we could avoid it.

And it just so happened, out of curtesy, emailed Malcom and the Area Sales Director just to let them know that this was going on and this was how we had approached the situation. Umm ... And [Marlon], supportingly, came back and said that is fine let me know how you get on. But the Area Sales Director came back and said 'we can't set a precedent for flexible working in sales. I recommend that you accept the notice'. (Freida Interview) [1.02.40]

In the face of these dialectical positions, the GM reflected on the situation and provided a rationale for her actions grounded in espoused corporate values and vision relating to women in management. In essence she was trying to shield her team from the standardisation expected from regional sales office and acted against the regional Sales Director's wishes. She articulated her reasoning;

And I thought that just completely contradicts what we are trying to do as a company in promoting 'Women in leadership' etc etc. And it is not about setting a precedent it is about what is right for your business. [1.03.20] So ignored it! And I went ahead and sort of said to Alison [name of the unit Sales Manager] 'give me a flexible working request, and it needs to work for the business. (Freida Interview).

This was knowingly and overtly counter to regional Sales Director's instruction. Frieda continued, "Whereas sales were ... the Area Sales Team was very much no! (Frieda Interview). This is arguably another example of a manager in the middle protecting people in their domain of influence, understanding the strategic terrain and the consequences of her actions. Having received backing from her manager and drawing on her role autonomy as GM, she made a decision about the staffing and resources in her unit. The actions of this agent-in-focus were shaped by her conjunctural knowledge; that is an understanding of the obligations and rights embedded in her role as Hotel General Manager, the macro, or strategic, context and the structures of signification and power. This agency blended values, and business logic with the desire to protect the team in the unit, live the values and vision relating to 'women in leadership' and deliver on the BSP. In terms of normative management theory, this action involved Facilitating and Implementing (Floyd and Wooldridge 1992). But more importantly, this evidence speaks to the gap that Hales (1999) recognised, to show *why* managers engage in particular managerial tasks. Hales points to "the defining characteristics of managing – responsibility" (Hales 1999:347).

Another GM explained how he had restructured some roles within his hotel in the context of changes related to the HR and Finance restructuring strategic initiatives. Neville reconfigured roles to retain a valued member of the team (in the finance function whose role was under review) into a different function, where he felt he was not getting sufficient support. This was motivated by a desire to keep a 'good' person in his unit and also solve what he saw as a deficiency in the HR function. This GM provided a business rationale but was motivated to shield and develop this person. This GM utilised his power and authority and drew upon 'allocative' resources (Giddens 1984), in terms of his budget autonomy, and 'authoritative' resources (over people), to constitute a new structure in his unit which provided a rewarding and secure role for this individual. As a middle manager in an international hotel group, GMs have to implement decisions with which they do not always agree, sometimes they can resist and other times they cannot. Their agency is often limited to adaptation (in this case) and mitigation. In the context of strategic initiatives this is when the buffering behaviour appears to be displayed.

The praxis of GMs in such circumstances is fraught with conflict and difficult decisions, being caught in the middle, as knowledgeable agents, they engage in discursive practices

(Rouleau 2005) to rationalise their own position and behaviours and to reflect on their actions, often utilising external attribution as a protective device. One participant whilst reflecting that emotion plays an important part in being a Hotel GM, acknowledged that the GM role “is a very lonely role.” (Nigel Interview). The examples presented above demonstrate buffering behaviour in a strategic context was often selfless and difficult, but also in contrast, it can sometimes be mundane and operational.

Gordon provided examples of operational, mundane buffering; one in relation to regional and guest feedback on social media and a third in relation to an incident with a disgruntled guest. During the interview, whilst talking about trust (which is one of the key espoused corporate values discussed later) Gordon described a form of buffering behaviour in relation to negative feedback from regional office regarding to guest online feedback and reviews.

And that for me ... I want my guys to trust me: I want them to feel that they can trust me.

And that is why I don't always put over the messages that they [regional office] give me, in the same way that they give them to me, because it just doesn't come across as being genuine. (Gordon Interview) [1.00.51]

Acknowledged as a form of buffering,

Absolutely. When I get a blast from my boss because our social media reviews are poor, and when I send that message down to my team, I have to put it in different language, so that it doesn't sound like – “you are all rubbish and you are all going to get fired next week. (Gordon Interview)

Gordon continued to provided other examples of defending and supporting a member of the front office team, who used the word ‘gaff’ and was rudely criticised on Trip Advisor. He recounted how he checked the dictionary and then posted on social media his word-of-the-day “Gaff” with full definition, as an indirect way of rebuking the guest and supporting his staff.

Because ... he has belittled my staff by making her feel stupid because she thinks now that she has used the wrong word.

But I can tell her: “you know what love, for me that is a fine word. (Gordon Interview)

This was clearly symbolic behaviour as the client is unlikely to see or connect these social media posts. In the third example, guests were checking out early and arguing about the charges being made which were in line with the Hotels cancellation policy.

I have just had a bunch of Arabs in the lobby who are complaining about ... they are supposed to stay until tomorrow and they are checking out today. So my front office team as per the regulation has to charge them for today. So my guys are being extremely formal and following the rules to the 'T'. So I went out there and I gave them [the guests] a little bit of my Arabic – because I was in the Middle East and we sat down together and we had a chat, and they left very happy.' (Gordon Interview) [1.04.47]

This could be interpreted as undermining his staff or some form of paternalism, but the motivation for action was to support and protect the staff and defuse any guest dissatisfaction, utilising his linguistic and cultural affinity he smoothed over the situation without giving way on the charges. These types of interventions are mundane and relatively unimportant but constitute a pattern of behaviour.

This nascent theme in the data, the notion of buffering, is one of the data-driven codes as opposed to theory driven codes mentioned in the research methodology. This is an important type of mediation activity carried out by the middle managers in this study. This was presented in the context of extant literature relating to managerial roles, it can also be differentiated from existing understandings of boundary spanning in the leadership literature and the SaP literature. Buffering identified in this study is very different to boundary spanning, which is predominantly defined as providing a link “between the environment and the organisation (Aldrich and Herker 1977:217) and between organisational subunits (Schotter et al 2017). Boundaries are defined very differently in various empirical studies, categorised as “organisational, spatial, cultural and attitudinal, internal versus external, personal versus institutional” (Pryor and Henley 2018:2213), thus demonstrating boundaries and boundary spanning are acknowledged very much as context specific (Rouleau and Balogun 2011).

Bettencourt and Brown (2003) review “customer-orientated boundary-spanning behaviours” (2003:394) of frontline employees (as opposed to middle managers) in the context of retail banking. Pryor and Henley explore the boundary spanning activities of leaders (BSL) in Higher Education environment where “the range, pace and complexity of change” (2018:2212) constituted a ‘perfect storm’ of change. They drew upon the work of the Centre for Creative Leadership to provide an overview of BSL, identify “six boundary-spanning practices: Buffering, reflecting, connecting, mobilizing, weaving and transforming” (Pryor and Henley 2018:2214; Ernst & Chrobot-Mason 2011; Cross, Ernst

and Pasmore 2013). From the examples presented in these articles, the buffering behaviour appears to be directed towards group dynamics and institutional impacts and often in use across horizontal boundaries and is carried out by leaders. Ernst and Chrobot-Mason (2011) provide a useful summary of research findings, in their practitioner orientated article, they describe buffering as “monitor and protect the flow of information and resources across groups to define boundaries and build intergroup safety” (2011:86). The buffering in this study is distinct in that it is enacted at a micro level, is directed towards individuals and is linked to both strategic change initiatives and normal operations. As such it represents a subtly different agentic behaviour for middle managers. To differentiate the findings here in relation to middle managers in general and Hotel GMs specifically, the term Micro-Buffering will be used from here onwards.

This study of micro-practices is fundamentally inspired by, and grounded within, the SaP literature and as such it is important to understand this construct of *Micro-Buffering* that context as well. The SaP and practice theory research presented in the literature review highlighted a range of roles and behaviours of middle managers, however, it is argued that this micro-buffering is different. Balogun (2003) analysed the boundary spanning activities and orientation of Middle managers and found in particular activity helping others through the change in terms of sensemaking. In terms of sensemaking, Rouleau (2005) found 4 micro-strategies; translating the presentation; over-coding the strategy; disciplining the client and justifying the change. In the context of Canadian luxury women’s fashion manufacturing, this revealed middle managers “as interpreters and sellers of strategic change” (Rouleau 2005:1435). These are conceived as routines and conversations, discursive practices, that are very different to Micro-Buffering.

In addition, in research set in a similar context to this study in terms of sociocultural settings, Brownell (1990) explored communication practices of hospitality managers and found vertical communication inside the organisation ‘translating expectations and role to those below’ (1990:199). Brownell’s study utilized survey method and revealed ten categories of communication activities, but this study did not focus on the content of these communications nor their purpose. McConville recognised the ‘shock-absorber’ role of middle managers in the NHS (2006:651), however she didn’t elaborate of this facet of MM agency rather she focussed on role tension and the dissonance associated with devolved HRM. Raelin (2011) observes in flatter, less hierarchical structures there is a need for

“facilitators of critical discourse to sustain and enhance local activity.” (2011:135) He advocates the term ‘weaver’ (2011:148) (a term drawn from social network field) rather than boundary manager, to describe the role middle managers play in supporting teams or networked groups. Thus, it is argued that the strategic agency in this study, identified as Micro-Buffering, appears to be different to these acknowledged middle management roles found in the literature to date, as such constitutes a significant contribution to knowledge.

#### 5.3.4 Structuration of the GM role

Thus far the findings have shown how middle managers exert agency in the implementation of strategy in HotelGroup, in particular the centralisation and standardisation initiatives being pursued in HotelCo. There are examples of strategically aligned practices, but also resistance and tensions of accountability and control and the notion of micro-buffering has been expounded from the data. In addition to these observations there is a clear evidence of structuration processes at play on the role and nature of GM work which result in change to the scope scale and status of the traditional GM position practices. Another theme in the GM testimony reveals the functional breadth of GMs day to day tasks or practice, as well as the strategic orientation of their practice, exposing (what the researcher has termed) their multifarious micro-strategising. In addition, the changing aspects of their autonomy and role, raises questions about the emerging structuration of the GM role, their position practice relations and potential unintended consequences of change for the practice of strategy implementation. These issues will be explored next.

As an institutionalised position practice or ‘slot’ (to use Bhaskar’s terminology) the GM role is a structurally imbued ‘position’, containing predetermined rights, duties and tasks. In the case of Hotel GMs these are institutionalised within the sector and professional bodies, such as the Master Innholders. It is a ‘target job’ (Ladkin 1999 :167) in the hotel industry with a long socialisation process (Dann 1991). The GM role is considered a commercially critical role, characterised as a ‘rainmaker’ (Roper 2018:66) with global chains building up a “cadre of management talent” (mainly male) to facilitate expansion (Roper 2018:67). There are well established rights and obligations associated with the job, which is likened to being a Managing Director of their unit (Gannon, Roper and Doherty 2010). As the leader of a remote business unit, the GM is the head of his hierarchy, in

terms of responsibility and accountability, the buck stops with the GM. One GM stated that “I would assume at the outset that the GM is the managing director of the hotel” (Jeff Interview) [22.56]. The GMs role can thus be typified as strategically important and highly institutionalised, thus containing sedimented structures of power, signification and legitimation.

From a structural point of view, the complexity in HotelCo is driven by competitive strategies of corporate institutions at a sector level. Due to the use of management contracts, operation and ownership are separated and outsourcing of services is common, including House-keeping, Food and Drink and Engineering, this has led to many different stakeholders with the GMs realm of authority. The fact that a full-service hotel “encapsulates three significantly different kinds of industrial activity within a single arena (property)” (Harris 2006:138) and the multiplicity of stakeholders provides complexity for the enactment of the obligations associated with the role and position of GMs.

As a position practice, the GM role encompasses “clusters of practices that make manifest the rights and obligations that are acknowledged by others; and institutional reciprocities, including asymmetrical power relations” (Cohen 1989:210). These clusters of practices cover a range of functional areas of management including operations, HRM, finance and marketing and sales, in particular Revenue Management. The analysis of the diary logs, which provide a window into the GMs’ day-to-day practice reveal the majority of their time is spent on operational matters, with approximately a third on HRM. However, GMs report that Revenue Management is the single most important aspect of their role.

This is my prime! ... this is the prime objective of any GM make sure the property rates are right, if you don’t have the revenue ..... if you don’t maximise your revenue you can’t be successful. (Jeff Log 17/7) [16.07]

It is interesting that this pre-eminence was not reflected in the frequency of RM decisions reported in the diary logs, but its importance was manifest in the interview transcripts. One potential explanation for this apparent contradiction is the tacit, routine and almost mundane nature of revenue management decisions for most GMs, which involves the daily catch-up meetings, the weekly revenue calls and the monthly business review meetings. One GM exemplified this when talking about his role in the interview.

So by a quarter-to-ten every day I am done with pricing and I am all about guest experience. Because if we get that right we will have 100% revenue capture, everybody will be happy, and they will come back. (Neville Interview) [52.41]

There is no doubt that revenue generation was strategically and operationally critical, with some GMs demonstrating a 'slavish' obsession with revenue. This is a critical area where the macro forces of industry competitive dynamics merge with the micro-agency of GMs in the contextual field, manifest in the Service Ethos and the unit level priorities in the BSP. Although not all GMs are 'slavish' about RM, it should be acknowledged as a highly important and institutionalised practice for GMs.

Another important facet of GM role, duties and tasks is the leadership of his unit and the management of the staff within it. The GMs' diary logs reveal that HRM activities have played large in GMs day-to-day practices. Within the strategic context GMs must administer HRM processes and mediate interpersonal relationships and power dynamics. The strategic initiatives of centralisation have resulted in a great deal of restructuring and many redundancies. Within this strategic context, HRM practices are often difficult and require high level interpersonal skills, carried out with less support due to the clustering of the HRM function. The agency required can be manifestly different, as the following excerpts show.

Graham recounted an important planning meeting, where he had assigned project responsibility to the Reservations Office Manager (ROM). The context was planning for a World Cup event in the city and the arrival of a national delegation including VIP guests that the hotel would be hosting. The event was complex and important, both a high-profile event and large impact on revenue (worth approximate £90,000 for this one event). Graham had worked with his ROM (called Liz) to prepare for this meeting which involved all the Heads of Department in the hotel and agreed that she would chair the meetings as the Project lead. Graham recalled how he had prepared Liz for the challenge of leading this major project and this significant meeting of her peers in the hotel.

My role within the meeting was to support Liz in leading the conversation. And to ensure that all areas were covered as they went through, as Liz is not necessarily from an operational background. (pause) I had asked Liz for what her concerns would have been both in leading the project and then also in leading the meeting. And she had identified a number of key items which I was able to support her with. (pause) And I took the time to have a conversation

after the meeting in order to understand ... had the coaching that I had provided her at the start helped her? (Graham Log 11/8/15)

This GM like others articulated strong commitment to the development of team members, mentoring colleagues and engaging in development activities. There were also several excerpts that addressed a very different facet of HRM, i.e. dealing with formal disciplinary processes (Gordon) and restructuring teams in the light of strategic centralisation (Nigel) and clustering initiatives (Neville). Grant recounted in several logs the interactions with staff affected by the restructuring of the Finance function. One particular meeting was with a member of the accounts team, who had worked in the hotel for 22 years and had to decide whether he wanted to volunteer to take redundancy, as the team was being reduced from 3 to 2 people. Grant reflected on the meeting.

The atmosphere and the tone of interaction was as positive as we could make it. But still quite direct and quite intense. I tended to draw on my values and previous experience. I drew upon my values in terms of I think you have to be fair with people – honest with people. And I had to be clear in terms of expectations following restructuring. (Grant Log 1/12/15).

Here the GMs demonstrate “observable attributes, associated with obligations and privileges” of their role (Cohen 1989:210). These examples show that when understanding the role and work of middle managers and GMs in particular, categorising activities by function (as is common in the extant literature) reveals very little about the detailed and accomplished agency involved in managing in the middle. In this context, the importance and difficulty of HRM functional interactions are a consequence of the strategic implementation and are affected by the clustering of HR. Again, the position practice relations have changed, there is less professional experience located in the units the GM and HoDs (Heads of Department) must take on much of the HR duties, changing their roles.

The analysis interviews and diary logs demonstrated that the enactment of the GM role requires accomplished agency, not least due to the stakeholder complexity but also the variety of tasks and duties regularly carried out by GMs. The variety is exemplified by taking just one participant’s data. This reveals four distinctly different foci in his four diary logs. Neville provided four logs over two months, it was notable that these covered a full range of functional areas and different tasks. His logs revealed; i) financial budgeting, detailed planning, balancing costs and revenues linked to the strategy for his unit

(Finance); ii) revenue management decision making involving negotiating and problem solving in relation to segmentation and revenue optimisation (Marketing and Sales); iii) managing health and safety monitoring service level agreement (SLA) and inculcating a service ethos into the operational protocols within his engineering function (Operations); and iv) restructuring of the sales team, through complicated redesigning of roles, recruiting new staff and reallocation of duties to better support the unit based revenue strategy (HRM). This variety has been discussed in the extant literature, but has not been studied from an emic perspective, i.e. from the perspective of the agents-in-focus. Brownell acknowledges the variety of tasks facing managers in hotels, she quotes Lang (1991) stating that “a special report on career burnout indicated that hospitality managers perform approximately 97 different tasks” compared to other industries where the figure is less than half (Brownell 1992:124). The evidence in this study aligns with Brownell’s early study. By providing a picture of the cluster of practices associated with the GM role, this study reveals the integrated and ‘messy’ (Ritchie and Riley 2004) nature of the day-to-day activities of Hotel GMs.

The data (mainly from diary logs but also interviews) revealed GMs oscillating between strategic issues and the mundane almost banal details of hotel operations. For example, in one diary log, Gordon reported intervening to authorise the local purchase of 176 bath mats at £1 each to avoid further customer complaints contrary to procurement procedures, and then host a Sheikh from the UAE a potential buyer accompanied by HotelGroup senior executive, whilst ensuring the unit staff were not aware. This placed additional demands in him “It’s horrible... I don't’ enjoy it to be honest, it almost makes me feel dishonest” [6.05], he continued, “The gentlemen from the middle east stayed all week... Quite a brain strain” [6.41]. This is another example of GMs mediating between strategic (meso level forces or agents) and protecting his unit team (at a micro level) as much as possible from unnecessary worry. Importantly, this study is not an audit, or a systematic quantification of the GMs role and activities, but rather presents a rich detailed picture of the accomplished nature of agency in the middle of a complex organisational setting. Exposing the common traits, duties and tasks associated with the GM role and noting the widespread use of mentoring for GM, the regular GM meetings and working groups, the ideas of what it is to be a GM become institutionalised. As such it will “endure as structured clusters of institutions even as successive cohorts or generations of agents participate in system reproduction” (Cohen 1989:210). By elaborating our understanding of these important and

established position practices, where structure and agency meet, this study complements the extant literature bringing a new perspective to understanding the GM role in a time of change.

The macro processes of change in the sector and the meso-level strategic response in HotelGroup has impacts for agency in HotelCo. The outcomes of this structuration process have the potential to change the role or position practices of GMs for the future. This questions the extent to which the strategic change will impact upon the scope and scale, and the autonomy and status of the GM role. For Cohen “positional identities are embedded in qualifications, display observable attributes, associated with privileges and obligations” (Cohen 1989:210); any changes affect all facets of these positional identities. One of the key themes in the data to emerge early in the analysis was the notion of autonomy as a key facet of the GM’s role, however the data also revealed trend towards a reduction or loss of autonomy linked to the strategic developments in HotelCo. Many GMs confirmed that it was the autonomy that attracted them to the role of GM (e.g. Jeff, Neville, Freida, David) but all acknowledged that along with the centralisation initiatives, there had been a gradual reduction in autonomy and a deskilling in the units. These quotations exemplify this.

Umm And ...initiatives that comes from Head Office. ... I feel in the last few years where the ... they... they try and bring a consistency to certain items. Now, which they ... with autonomy removed from the property... ... So, the autonomy of decision making is reduced significantly – those types of things. It is gradual. [23.43] (David Interview)

We are going through a massive decentralisation approach, at the moment as well, and that has been quite tough as well, because again, we have been used to being able to make decisions more and to have more control of our business. [24.48] Whereas now, that element of control or autonomy is removed from the hotel level. I think that slowly but surely the general managers now are becoming more operational managers. We are losing that kind of autonomy for decision making in the hotel. [25.40] (Freida Interview)

This theme is not unexpected as there have been a few earlier studies that have considered autonomy noting that it is complex, multifaceted and varied on functional lines (Elbanna 2016; Hodari and Sturman 2014; Hodari, Turner and Sturman 2017). Notably Hodari and Sturman (2014) found less autonomy in hotel chains and more in independent hotels; HotelCo is a relatively small chain but the current strategic initiatives are to facilitate growth so changing the company for good. The centralisation of the RM function changed

institutional reciprocities and asymmetrical power relations associated with the GM role. As already explained this created spatial and temporal dislocation within this critical function, moved power to the centre and reduced the agency of some GMs. The standardisation of the F&D offering also reduced the opportunity for innovation and creativity. Along with other changes clustering of HR and Finance and the implementation of central procurement, this has led to a deskilling in the units. It would seem that increasing structural barriers have been erected in the case company through the processes of centralisation and standardisation. The removal of staff in the unit (in terms of RM, HR and FC), restructuring of roles in the units and the region and the provision of centralised datacentres have diminished the unit role and the GM role and duties have changed as a consequence. This changes the network of position practice relations, within the agents' contextual field, new or changed rights and reciprocities will emerge or be created through dialectical interactions between the unit and the centre. This results in changed practices and ultimately through a process of structuration and new more diminished role is emerging, typified as a change from the Hotel General Manager to a Hotel (operations) Manager.

A parallel trend related to the increased emphasis on business objectives emerged, GMs reported an increasing importance of financial objectives and the need for a business acumen. The influence of new leaders and cascaded strategic control mechanisms in the form of the BSP, set tightly monitored performance objectives for GMs, combine with operational changes described above, result in the role, becoming more a businessperson than a hotelier. The performance management culture exposed GMs to constant financial scrutiny, Nigel talked about the pressures associated with running the business whilst still trying to be the visible figurehead of the business, "so often you are stuck in the office answering a million-and-one emails. So how can you be out there greeting guests" (Nigel Interview) [25.00]. Many GMs recognised the balance between being a businessman (their language) and a hotelier.

And I think the role of general manager, when I look at the general managers that I had when I was a chef, to what a general manager is now, I think we are more businessmen than we are hoteliers anymore. (Gordon Interview) [22.44]

This change brings into relief the disjuncture between traditional career paths that emphasise food and beverage experience (also called Food and Drink - F&D) and

increasing importance of business acumen. Nebel, Lee and Vidakovic (1995) found 45% of GM came through the F&D root and Ladkin identified F&D operations as a ‘salient’ role (Ladkin 1999:167). In 2005 Harper, Brown and Irvine identified a move towards a more business perspective in the role of hotel general manager” (2005:51). This would suggest that not only is there a continuing shift in the emphasis in the role but that the strategic implementation processes in HotelCo are changing the way GMs engage in their day-to-day practice and thus agency and structure are combining driving changes to the position practice relations of Hotel GMs.

In this study, there is a trend towards strengthening external structures of power, with changes in the allocative and authoritative resources available to agents in the field, this has the potential to inhibit individual agency of GMs. In the face of this, GMs still sought out and took opportunities to exert agency in functional areas where there was still room to manoeuvre and a business rationale. For example, Neville recounted flexibility in relation to central procurement and choice of materials for refurbishments. Other examples of autonomous decision making were within the areas of F&D, such as Jeff, who adopted a new approach to MICE in his unit and David’s proactive resistance to new standards. Interestingly, GMs reacted differently to this change in the GM role, in line with their own career stage, interests, self-identity and aspirations, some focussed on areas where they could make an impact and built on their experience and self-perceived strengths. Nigel was on the Food and Drink Steering Committee (F&DSC) (Nigel Log 22/6/15) and David was involved in a drinks project (overseen by the F&DSC) and talked about how to make change and bring the GMs along cooperatively. In this way these GMs were able to maintain their self-identity, build new skills or establish new contacts and social capital, thus building their capabilities to exert agency in the future.

Other GMs in the study sought more senior positions to break out of the unit setting, Jeff revealed his aspiration for a regional role, in line with his own identity and aspirations. With this in mind he has extended his role, from merely mentoring new GMs and HoDs to formally managing some GMs in three units in his region. Neville and Grant both left the organisation during, or soon after, the period of the field work, although there could be a myriad of reasons for this, the researcher was able to explore Grant’s reasoning, in one of the phone calls during the field work. A telephone conversation with **Grant** revealed his plan to leave and his personal perspective and logic.

I apologise for not mentioning it before, I am leaving the company to work in a smaller company, which will be better for me and better for my wife. I will have more freedom and more room to make decisions. The tightening of decision making is necessarily bad and if you have no basis for comparison it isn't a bad thing, but it's not right for me. I want to go and work for a company where I can be a General Manager not a Hotel Manager. (Grant call transcript)

What is revealed through the GMs testimony is a structuration process in play, driven by external macro forces, that affect the meso-level organisational structures and the micro practices, these in turn sediment new practices. Those GMs who remain absorb the changes or reposition themselves to maintain their identity or sense of self, thus recursively reproducing the new diminished role, others leave. What is significant for the future is whether a 'cadre of management talent' with less agentic power is actually detrimental to the hotel industry.

The GM role is a unique position practice in the international hotel industry, it remains multifarious in nature and critical to strategy implementation. However, this study has revealed how it is changing, within HotelCo reduced agency and diminished status, changes the rights privileges and obligations of the role and importantly the positional identities institutionalised therein. The details from this study, not previously reported, characterise a diminished role changing from GM as managing director to Hotel Manager more akin to Operations Director, there could be unintended consequences with a loss of beneficial agentic resistance in the practice of strategy implementation.

In conclusion, the research question in this study is how do middle managers implement strategy through their day-to-day practice and what role does culture play in their agency? Evidence of the accomplished practice of middle managers has been presented, set within a rich complex sociocultural context, to reveal how they implement strategy on a day to day basis. Revealing how GMs augmented the process of centralisation by effectively communicating local knowledge and mobilising this to steer decisions and implement strategy. The data also revealed how these middle managers navigated power asymmetries, tensions of control and accountability, and communication and understanding of expectations, in addition to mediating local and temporal factors.

Utilising Stones' SST (2005) it has revealed the five aspects of active agency, including, shifting horizons of action, improvisation and innovation, degrees of critical distance and reflection, motivations for action and ordering of concerns. This reveals how the agents-in-focus engage with strategy implementation, sometimes they resist, i.e. act otherwise (Stones 2005), either covertly or overtly, other times they conform and accept decisions even though they do not agree. Evidence has been presented showing how GMs draw upon their own personal dispositions to articulate logical (business orientated) rationale for their actions, and how they engage in symbolic resistance and maintain ontological security in face of difficult circumstances where agency is significantly restricted. In the cases of resistance revealed here agents possessed adequate power and the capability to act, with knowledge of alternatives and consequences, and sufficient critical distance or "requisite reflective distance" (Stones 2005:114) in relation to external structures and their conjunctural manifestation. Thus far the first part of the research question has been addressed, it remains to be understood how culture is implicated in their agency, this will now be explored in detail.

### **5.4 Culture and Middle Managers' Agency**

The question at the heart of this research is how do middle managers implement strategy through their day-to-day practice and what role does culture play in their agency? This thesis asserts that in the context of strategy implementation, managers will draw on their knowledge of the strategic intent, culture and norms of the organisation and the expectations of their role to deliver performance outcomes in the course of their day-to-day actions; as such they will maintain or change those plans and assumptions. Culture is every day, ubiquitous, common place and complex, it can be simplified as 'the way things are done around here'. However useful this colloquialism belies the profound complexity and importance of a system of beliefs, ideas, values, feelings and behaviours that guide people day to day. The literature review reflected on culture as a process (acculturation) and an outcome embodied in both structure and agency through a structuration process. The findings presented here will expose the cultural context and motivation for action of middle managers, thereby revealing the potential role of culture in strategy implementation decisions and actions. Acknowledging that centralisation has spatial impacts, potentially changing the cultural context for agents in the field of position practice relations. Evidence from the field will show how middle managers implement strategy and in what way culture

is implicated in their active agency. It will be useful to explore how the service culture and organisational culture imbue and reinforce each other, how the corporate culture is inculcated and reinforced through actions, and how GMs draw upon culture in their enactment of strategy implementation, thus whether culture and praxis are sustained and potentially changed in the process.

#### 5.4.1 Culture as The Service Ethos

All GMs acknowledged the importance of culture in this service organisation, but all found it somewhat difficult to describe. Graham was clear about the value of culture, comparing HotelCo to other organisations he had worked, he stated “Hilton’s infrastructure is so much better – but HotelGroup’s culture is so much better” (Graham Interview) he continued,

however from me, and my point and how I like to work, is that the culture is so much more important. If you don’t have the computer systems and that infrastructure there that can all be developed. And that is what we are doing at the minute. But if you don’t have the culture ... it is going to be very difficult to make that infrastructure work for you essentially, if that makes sense? (Graham Interview) [25.05]

In their testimony, many GMs acknowledged the difference between HotelGroup and other global hotel chains in terms of culture, and when asked to describe the culture round here, they all referred to the “Service Ethos”. The Service Ethos (described in section 5.2) is a phrase/slogan accompanied by a programme of training that sediments a set of positive attitudes and behaviours relating towards guests and team members. This ethos underpins and is embedded in the BSP (Business Strategic Plan - also explained earlier). From the GMs point of view, this provides both guiding principles and a tool for managing their business. It forms structure that is both overt and external but also internalised in norms and behaviour. For example, when asked how he would describe the culture of the organisation, one GM simply said.

I think there are only three words to describe the culture, and that is: ‘the Service Ethos’ .. [pause].. So it is still ‘work in progress’ as it will always be. But I think if you cannot give a ‘service ethos’ response – to something .. sorry ... if you can’t give a ‘service ethos’ response you shouldn’t give a response. (Grant Interview) [47.03]

The service ethos emerged not as synthetic corporate rhetoric, but as a source of attraction to people to join HotelCo and as a resource for GMs. Arguably embedded in external

structures and internalised in conjunctural knowledge (Stones 2005) there was evidence of alignment between the GMs and the corporate culture, one GM noted,

In terms of the value of the company, and what attracts me to them: First of all I would say that I think they genuinely appreciate your input and seek your input. .... I'm probably naturally I am quite an innovative and creative ... So, that is a huge attraction for me, that the company value that area. So yes, I think the values: [Service Ethos] .... Umm , I also like, and it is not in a cheesy way. (David Interview) [08.18]

He continued,

'we innovate to shape our future' which is one of the pillars of our promise. Innovation is very important for our organisation. Something I hold close to my heart. Which the marriage of my personal values ... and appreciations, marry quite well with what [HotelGroup] issue. (David Interview) [08.26]

Grant and David were not alone, many GMs talked about how the service ethos guided all interactions between and within colleagues and guests, providing a cultural schema to guide behaviour. "Well I suppose the key thread through everything will always be the 'service ethos'. That is the brand value that ties everything together you know and having the guests at the heart of the business." (Nigel Interview) [24.50]. Another recognised the Service Ethos for its simplicity and authenticity, "the thing about [Service Ethos] – it is simple, it is really related to anything that we do, and actually it works. And it is easy to explain to every single person in the business." (David Interview) [08.18].

Data from public domain information and interviews reveal the Service Ethos is a long-established service culture training programme that everyone in the organisation is put through, it is simultaneously symbolic and ritualised, and yet it is regularly reviewed and updated. Whilst discussing the importance of the Service Ethos, one GM acknowledged its currency. "Well, it is going to be remodelled next year, but it will still be [The Service Ethos], but it will just be how we refresh it and keep it modern." [24.54] (Nigel Interview). This shows how the organisational culture in HotelCo, manifest in the 'Service Ethos', is ongoing, and to a degree, pliable (Archer 1985; Harris and Ogbonna 2002). Forming an important element of the external structures for the agents-in-focus, the Service Ethos provides a grounding for practice, it provides structuring properties that can be theorised as rules and resources that impact culture. Not with standing Ogbor's view of its hegemonic power (Ogbor 2000), organisational culture can be theorised as rules (Giddens 1984) encompassing 'legitimation', guiding normative concepts for conduct and

interpersonal behaviour and signification, facilitating understanding and meaning making (Stones 2005; Parker 2006).

The Service Ethos is an objective, material artefact, (objectified through the wearing of lapel pins, displaying posters and documents) that can be, to a lesser or greater extent, subjectified and internalised by individual actors (Hays 1994). As agents in the field, middle managers can draw upon the Service Ethos to drive particular behaviours amongst their team, to establish norms and to provide themselves with ontological security. GMs draw upon the espoused cultural values, especially when aligned to their own personal dispositions, in the context of their own conjunctural knowledge, in this way culture can be implicated in the implementation of strategy.

GMs recognise in a pragmatic way, the value of the Service Ethos training, for improving the service culture in their operational units. Graham experienced the benefits of the Service Ethos training in his previous units stating,

whenever I took over and I identified that there was an issue with that, I actually sent the entire hotel through '[Service Ethos]' again. And immediately the guest satisfaction scores ... you could literally plot it on a graph. You could see from exactly when it happened to the Climate Analysis scores year-on-year, to just the general atmosphere around the building. It just (*clicking fingers*) instantly happened. (Graham Interview) [35.12]

What was important to Graham was the manner in which he observed the training affected the day to day interactions between staff as well as between staff and guests. He continued to explain the practical and social benefits.

if you then get this mind-set back in where it is not all about the computer work that you have to do and all of those sorts of things: how much impact does that have on you as a person? [35.34] To put that forward into your team and to inject that enthusiasm: How much more productivity will you get out of them? How much more enthusiasm and buy-in will you get? And now we are actually at a stage whereby we are all a little bit excited about it now. And they have bought into what it is about. So, yes... (Graham Interview) [35.49]

The service ethos became sedimented in behaviours and with acknowledged positive discourse associated with it, it is more likely to be internalised and passed on to other organisational members, thus sustaining the culture. Through this action the agent-in-focus

and the unit which he/she leads is more likely to be able to deliver the BSP for the unit and strategic aims of HotelCo, thus facilitating strategy implementation.

Neville discussed the value of the Service Ethos from the beginning, referring to its importance at the recruitment phase and how it is embedded in HR practices. Many commentators of the hospitality and hotel industry observe the importance of attracting, recruiting and retaining the right people (Korczynski 2002). Service industries recruit for attitude rather than skill (Boella and Goss-Turner 2020), in terms of Hotel Co, this is also the case. It is at this point that the inculcation of cultural norms and expectations can start to take place from the outset, and this along with induction and regular ongoing training and refreshing, is how the ‘unique’ Service Ethos of HotelCo is sedimented and sustained. Theoretically speaking, the Service Ethos represents reciprocated institutionalised, stocks of knowledge (Berger and Luckman 1966) that develop “shared perceptions of daily practices” that are at “the core of an organisation’s culture” (Hofstede et al 1990:311). The interview with Neville provides evidence of this.

I think ‘[Service Ethos]’ is a starting point for our philosophy and our service culture ... but ... and that really ... the ‘[Service Ethos]’ values are applied more to the recruitment process. Because, if you attract and recruit the right people into the business, you induct them through the ‘[Service Ethos]’ program – I wouldn’t always refer back to ‘[Service Ethos]’ because you have got people with that natural hospitality and those values. [27.50]  
We refer back to ‘[Service Ethos]’ at every touch-point, I think, through peoples’ career journey and the succession planning, whether that is a review or it is the strategy. [28.33] But I strongly believe that if we get it right in the recruitment phase the ‘[Service Ethos]’ service, then the hospitality looks after itself. (Neville Interview) [28.44]

It can be seen how the Service Ethos represents a guide for social relations within HotelGroup and provides a system of meaning for the GMs and their teams, these are two key elements of culture (Hays 1994). It represents a cultural force that impacts on the daily lives of organisational members.

Although many GMs were not always able to articulate what the culture was without reference to the “Service Ethos”, Neville neatly framed his own take on Culture.

It is very difficult and it has been an interesting learning curve for me actually and my management ... my management approach/style. [49..34] I think first of all you need to understand the motivation and where the culture has been

developed from. You then need to understand the people and their ambitions. To be able to drive change, adapt culture to make it relevant for the clientele, the local market and the changes in the economy.[49.58]  
And the culture itself I believe is ... starts off as, this set of ideas that become a behaviour that become a reinforced expectation. (Neville Interview) [50.06]

This articulation of culture as a set of ideas, aligns with discussions in the Literature Review. Neville continued to relay an experience from opening a large unit in the Midlands. He got the whole team together (all HoDs and senior team) to discuss the culture and to agree what mattered to them, what behaviours that had seen elsewhere that they did not wish to replicate and the behaviours they valued and did want to encourage in this new unit. The whole team agreed a collective view on 'what mattered around here', "[b]ecause culture for me is the heart and soul of the guest experience: it is very difficult to change once it has been reinforced." (Neville Interview) [50.44].

The patterns of the attitudes and behaviours revealed across the data set, demonstrate that GMs, as knowledgeable agents, draw upon culture through the Service Ethos, in an instrumental fashion, in their day to day practice to implement strategy. This evidence could be marshalled to demonstrate a 'strong' organisational culture (Harris & Ogbonna 2002; Goss-Turner 2010; Brander Brown 2002), to support a treatise about integration of cultural norms across the organisation (Martin 1992; 2002) or legitimise the hegemonic power of corporate culture (Ogbor 2000), but this research does not set out with these purposes. The purpose of this research is to demonstrate how culture can be implicated in the agency of middle managers. What this evidence does reveal is the perception of the GMs relating to the Service Ethos, their attitude towards it and their own constructions of organisational culture, simply put, what matters round here. The Service Ethos is embodied in external and internal structures and is drawn on in action. From a structurationist view this demonstrates the agents-in-focus draw on the significations contained in espoused culture and to bring meaning to situations (semantic domain). Thus, established norms, legitimised behaviours are replicated and, through the agents' capability, culture is utilised as a resource to achieve domination and exert power in a very pragmatic way. This way cultural norms are reinforced through the agency of middle managers.

### 5.4.2 Culture as values

Values are a key element of culture, considered by Hofstede (2001) as a deeper internal core of culture; values, and particularly shared values, guide behaviours (Alvesson 2002; Martin 1991; Schein 2004). Schein (2004) acknowledged the need to understand espoused beliefs and values, which provide the norms for behaviour and are reflected in organisations philosophies. As mentioned earlier, HotelGroup have espoused corporate values encompassing hospitality, trust and creativity, also including honesty, transparency and claiming “we genuinely care” in their corporate promise (Corporate Publication Aug 2017). In addition, they promote a professional, proactive and entrepreneurial ethos (Corporate Publication Aug 2017). The data set generated in this research revealed some common values across the GMs and also revealed how these guided their behaviour. In HotelCo, the agents-in-focus talked about values, their own values and those espoused in ‘The Service Ethos, including the challenge of remaining true to them in difficult times. The key themes and examples from the data show how these values (an aspect of culture) are implicated in strategy implementation. As would be expected, the corporate espoused values, and personal values were revealed by GMs in their interview reflections and diary logs, what is interesting is that these featured in their own articulated internal logic for day to day decisions and actions. These form a key part of the agents’ discursive consciousness (Stones 2005; Giddens 1994:xxiii) and show how culture is implicated in the agency of middle managers.

The life history (background) part of the interview revealed insights into the GMs’ value base and internal logic for action. Neville articulated his own self-evaluation, when asked about how his upbringing affected his decision making, thus reflecting on his general dispositions and habitus he stated.

Mmm... (*sigh*) I suppose a driven fair professional based on expertise and experience. And the drive has to be linked to the fairness, in terms of consistency. [26.13] I think it is ... you have your own sort of ethical standards. And you have to consistently apply them to your daily decision making: monthly-weekly strategy. It is difficult to define but certainly I think that fairness comes with transparency and honesty and ... consistency as well. I don’t think anybody should ever be surprised by a decision. (Neville Interview) [26.45]

This verbatim quote shows clearly the link between cultural values and how these are sustained in day to day practice. Neville naturally identified these values as his own, fairness, professional, transparent, and honesty, all of which were embedded in corporate publications relating to the Service Ethos. These were relayed as drawn from his family upbringing, although it is not possible to know how the corporate inculcation had affected his discursive consciousness, these remain his self-reported guiding principles. Another GM, Frieda, revealed the importance of having passion for hospitality, a key value that people cannot fake or imitate.

And for me, you know, it is a bit of a cliché, but the team here have to have the personalities to serve guests, to be hosts. Because otherwise it just doesn't work. You can't pretend to want to host a guest. (Frieda Interview) [16.55+] ...sort of service industry, is about caring and about wanting to welcome people and wanting to make people happy. It is giving them that warmth and (pause) sort of this is your home. (Frieda Interview) [18.00]

This is another example where the personal values align with the organisation culture and industry values. According to Telfer (2001) hospitableness can be viewed as a trait, the “reason why people choose to pursue a trait of hospitableness is that they are attracted by *an ideal* of hospitality, founded on a sense of the emotional importance of the home” [Emphasis in original] (Telfer 2001:53). Who is to say whether the HotelCo ‘Service Ethos’ training inculcated this idea in this individual or whether they possessed this trait prior to joining this company or this industry. What is important here, is that this culturally grounded value imbues this agent’s decisions and actions. This trait was evident in all GMs, articulated throughout interviews and logs, as part of the rationale for action. One GM explained the different cultures he had experienced in different units and different techniques to keep the team focussed on what matters. He stated “It was more about, I believe that ... for me hospitality is about creating a ‘home from home’ environment” (Nigel Interview) [18.47+]; this is the essence of hospitality and hospitableness as defined by Telfer and others including Gebels, Pantelidis and Goss-Turner (2019).

Thus, it can be seen how culture lodges in the agents’ internal structures and combined with their general dispositions (Habitus) is implicated in actions which perpetuate this cultural trait, or norm, in external structures. Being a host is fundamental to Hotel Co’s ‘Service Ethos’, (Hospitality is the first and foremost espoused corporate value) it is central to the ability to deliver the guest satisfaction guarantees and as such as the dominant

rhetoric across all communication platforms, such as in CEO presentations, in the Service Ethos training and recurs implicitly or explicitly through GMs testimony. Putting the guests at the heart of everything, is fundamental to the service culture, being hospitable and being a ‘host’ to the guests is of paramount importance. Graham recounted his experiences at an airport hotel.

An airport property is very different because it is in-out-in-out-in-out. And it is a very difficult environment to work in. [31.32]. But still the element of that culture of... well these guests are here for 24 hours or even less, at the start of their holiday – the end of their holiday. You need to make this a culture of ‘you are welcome’! You have got even less time to make an impact, so you have to make that impact last. (Graham Interview).

Many GMs also talked about innovation, this espoused corporate value has been central to the corporate rhetoric for many years, but along with other corporate values has been put under strain in the face of strategic exigencies, as will be shown later.

In summary, the organisational culture in HotelCo is embodied, reinforced and replicated through the values entrenched in the Service Ethos training and day to day actions. The training reinforces the values of the organisation and facilitates a common understanding of the norms and expectations for behaviour and thus potentially inculcates these structures of signification and legitimation into the conjunctural knowledge of agents in the field. The Service Ethos is claimed as a unique selling point (USP) for HotelGroup and GMs acknowledge that this is a key factor in making HotelCo and HotelGroup an attractive place to work. The Service Ethos (and the values imbued within it) is at the centre of the inculcation and sedimentation of culture in HotelCo, it is synonymous with the organisational culture and through day to day utilisation becomes reciprocated and mutually reinforcing. It provides support for the agent-in-focus to deliver results in their units by improving customer satisfaction scores, it enables the matching of recruits with hospitableness traits and, as will be shown, provides ontological security for GMs allowing for dissent and challenge.

### 5.4.3 Challenge as a cultural norm.

The GMs role has been established as a critical role (Roper et al 2001; Hodari and Sturman 2014), a key position practice (Cohen 1989) with various rights and obligations. One

interesting theme emerging in the data, which does not appear to have been articulated in the extant literature is the importance or at least acceptance of the challenge GMs provide inside the institutions. It is interesting to explore the extent to which challenge can be observed as a cultural norm in HotelCo and what this means for the implementation of strategy and the micro strategising of GMs. Grounded in the values relating to innovation, proactive entrepreneurialism, many GMs mentioned this notion of challenge and often utilised it in defence for their non-conformance in action (i.e. acting otherwise). It is thus useful to expose how ‘challenge’ is articulated as a cultural norm by GMs and how this can impact upon their ontological security, empowering them and playing into their implementation of strategy. As explained in the literature review, culture offers contextualised understandings of norms and expectations for agents in the field and can also arguably be a source of ontological security (Cohen 2008; Giddens 1984). For the agents-in-focus, it can be postulated that culture could enable GMs to challenge and resist the strategic initiatives. It is useful to explore evidence of how challenge is viewed as a cultural norm by many GMs and how culture provides the underpinning for the resistance to hegemonic rhetoric and supports agents acting otherwise in the context of strategy implementation.

Micro excerpts from interviews and logs reveal challenge is viewed as acceptable. Nigel included a general reflection in response to research prompts about cultural norms and ways of going on in HotelCo, particularly in relation to a recent GM conference. “But [Marlon’s] own comment was that he wishes he had more people like that sometimes [referring to Nigel’s challenge to the Regional Director of RM]. Rather than saying ‘yes-yes-yes’ they actually challenge what we do”. (Nigel Log 29/5). Marlon is Nigel’s direct line manager as Regional Director in the UK for HotelCo, this quote came from a recent review meeting. Neville also alluded to the acceptance of challenge. “But actually, when you challenge it is accepted and encouraged.” (Neville Interview) [24.01] and when discussing culture in the interview, Grant confirmed that he felt GMs were selected and developed to be able to challenge.

And you would always hope to do it in a professional and rational way. But we have kind of been ... over time we were chosen because we could challenge, and we were able to challenge. (Grant Interview) [55.27]

This recognition of sanctioned resistance or non-compliance, what some would call deviance (Lugosi 2019), and what structurationists would call ‘acting otherwise’ is not isolated. Another GM naturally relayed this notion, whilst talking about his own agentic behaviour. “Yeah – I have always been of the mind-set that it is easier to seek forgiveness than permission.” (Nigel Interview) [31.15]. When discussing the implications of decentralisation and the growing size of the regional team, the increase in standardisation, one GM acknowledged that challenge was absolutely part of a set of cultural norms, quoting the regional AVP for validation.

But then I suppose the other thing that we are encouraged to do as well, and which has come from [Robert] as well, is to challenge decision making and ... I have never strictly been told this, but as long as you are challenging in the right manner – respectful/reasoned ... it is certainly taken in a very open and transparent way. (Neville Interview) [1.26.10]

There have been many examples of resistance or adaptation to strategic initiatives provided in section 5.3.2, these were often underpinned with rationale or business case, but also articulated in terms of personal disposition and values and organisational culture, manifest in the Service Ethos. The acknowledgement that challenge may be a widely understood cultural norm, will provide GMs with the confidence and safety to act otherwise. Resistance is thus arguably culturally acceptable, and so is embedded in the rules, routines and sanctions (to use Giddens’ terminology) in HotelCo supported by the “Service Ethos” across HotelGroup. This notion of challenge can thus be seen as embodied in culture and within the position practice roles of GMs. Thus, being both a structural facet that is clearly institutionalised through agency. The following vignette provides a detailed exposition of another GMs resistance that draws upon the enactment of HotelCo’s espoused values.

This example reveals how GMs defend (through enactment) those values that are close to their heart or identity. David also recounted the challenge of living the values and how his own internal drive to innovate brought him into some conflict with his senior managers. In the context of a discussion about the F&D standards, David recounted some innovations he has implemented in his unit. Creatively developing a locally grounded concept restaurant and bars, drawing on the city’s history and heritage to create new and innovative F&D outlets on the ground floor of his city centre unit. These were branded differently to the standard F&D outlets across the brand and involved minor refurbishment, including installation of TV, curtain screens and new uniforms. These innovations were implemented

through the agency of this GM, counter to the prevailing standardisation of F&D, this is an example of a GM acting otherwise and drawing on the corporate values (aligned to his own). The following excerpt is somewhat extended, but the context is important to demonstrate the multifaceted agency of this agent-in-focus and shows how he draws on the values embedded in the ‘Service Ethos’ and organisational culture to empower himself.

I think touching on that, it is probably where we’ve tried to be a little bit creative and innovative in the space. [24.51] And you know there is a difference of opinion of that. And some people will criticise because the G, kind of maps in that area the menus have changed and bringing in the TV, bringing in the wine unit is all very new. ... That was done in August, August/September: it’s not quite finished. But that has caused actually... somewhere ... from a Head Office point of view, there is some dissatisfaction that that has been done. Because they don’t think it is consistent with the brand. Which it isn’t. (David Interview) [25.30]

But in the unit’s point of view we have had outlets which have performed very averagely for a number of years. And my idea is you have to create stories... you have to give stories in food and drink, and you have to ... Stories engage teams, stories engage guests. So, we created [concept name] which is an area of Glasgow, brought in some [concept name] menus. We had ... we brought some history into the drinks list. And created a story of a real part of Glasgow – which would never sit at any other area. (David Interview) [26.09]

This agent-in-focus, had a strong desire, drawn from within his own personal dispositions, to innovate. Innovations and creativity are one the key values of HotelGroup/HotelCo and ones that were aligned to this agent’s own *habitus*. This form part of his motivation for action. He continued to justify his actions, drawing on his own experience and knowledge.

But food and drink moves so fast. You know it changes every couple of years. It changes, it changes, And changes. So, [Concept name] at the Atrium gives it a guest feel. [Concept name] is only guested in this bar, like a pop-up bar<sup>7</sup> for 2 years and then you change it again.

I think ... you know it has ... the menu, it is a nice story and there are lots of different ... you can sell fine wines now and there are lots of craft beers. And you know, it gives you an opinion and that is sometimes what you want. (David Interview)

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<sup>7</sup> The concept of a pop-up is a contemporary trend in hospitality, fashionable but temporary outlets can literally pop-up in a location or venue for a short period, either as transient concepts or as pilot for more permanent installation.

The GM confirmed a huge improvement in performance financially, although he recognised there were still some service issues affecting customer satisfaction. Which were attributed to a delay in full implementation.

Yeah ... we are ok. But we need to be better... That is just a fact of where we are at there. And we need to finish that off ... we are still waiting for somethings. There is a ... with the TV will we have theatre curtains around? And there are uniforms coming for the team. And things that haven't arrived yet. So... (David Interview)

What is noteworthy here, is that this GM's actions directly countermand the continued implementation of standardised F&D offering across HotelCo. He made these decisions in full knowledge of the strategic initiatives, or to use Stones' terminology the strategic terrain, and the associated structures of power and significance. Reporting the views of his direct superiors.

But there's been some contention with [Marlon] and [Robert] who aren't really in favour. [deep breath/sigh] I can understand their point of view for sure. But also, what I would say, the outcome of that is it is a little bit hard for me to ... this is where there is a contrast between where they strategically say .... they want innovation. [28.02] So we say, 'we innovate to shape our future' And then we talk about 'fighting spirit'. So, when you look at the values of the company, I find it is a little challenging because all I have done is spend regular (unclear) money and try and create something, which drives the business forward. So it is a double-edged sword and I think, I don't know... as I say, I can see both sides. (David Interview) [28.16]

Here is an example of the espoused values relating to creativity and innovation being restrained or restricted by regional hegemony in the context of standardisation initiative. What is particular galling for the agent-in-focus is the centrality of this value to his own sense of self and his own identity as a GM (an example of Ogbor's dialectical tensions 2000). The very aspect of organisational culture that attracted him to HotelCo, is the aspect that is now being constrained. This may provide a window on his personal internalised motivations for action, made accessible through his discursive consciousness (possibly driven by some deep held motivation in this agent's practical consciousness too) but he also revealed (as many GMs did) a business rationale for his actions.

But from my point of view, reporting to the owner, he is very happy because the financial performance is much improved. It is significantly better than it has been for a number of years. (David Interview) [28.39]

Probing about the position practice relations and the power dynamics involved, between head office, the GM role and the hotel unit owner, this agent-in-focus demonstrated full understanding of his role and the expectations embedded in the position practice relations, however he nonetheless acted otherwise, fully aware of the consequences of his actions. This excerpt from the interview, revealed his knowledgeable agency, full knowledge of his role as a GM and his deviance from the company line.

Yes, So your job is to manage [HotelGroup] within this property: to your job as a General Manager, to ensure the brand standards of [HotelCo] emanate, are very clear, are driven, are influenced, are in place. That is a big part of your role to ensure that we operate as a [HotelCo brand]. [29.27]

So, to come back to the point of the bar downstairs [referring to the Concept name], this is exactly where I can see when [Marlon] and [Robert] are maybe not best pleased about the situation there. Because you know, they might ask a very honest and correct question: ‘Does it comply with the brand?’ [29.50]

I can see ... I can totally see that. Yeah – I think ... and I can see both sides. I am not naive and not gun-ho ... I completely understand [Marlon] and [Robert]’s concerns completely. (David Interview)

Interviewer probed to understand the extent to which this was in fact deviance or authorised experimentation, by asking, “Do they not have to approve it before you can do it?” (Interviewee)

[Mimicking ducking! And repeating his narrative] I can understand their concerns. [31.10] But...! To be fair, they have been in the property before that happened and it was explained what the plan was and what we intended to do. And so, in my mind I guess it, that a felt the discussion had been had. I wasn’t spending money. There was no significant investment in that. [31.25] So, you know all I was trying to do was (probably going back to the farm) [reference to his family background] where you try to create a space and engage with people in the community and engage with people in the market. (David Interview)

This GM acted otherwise, he knowingly deviated from the strategic initiative (which aimed to standardise F&D provision in all HotelCo units) to create a unique F&D offering in his unit. As with earlier examples from other GMs, he grounded his own rationale within the business objectives, drew on networked relations and implicated cultural values. Clearly evident in this example are aspects of active agency; “shifting horizons of action, creativity, improvisation and innovation, degree of critical distance and reflection, conscious and unconscious motivations and an ordering of concerns, or hierarchy of

purposes” (Stones 2005:101). This agent had experienced working within a corporate initiative and had already built up social capital in the company, featuring in a corporate video, probably giving him confidence to take risks. His horizon of action was short-term, being acting GM in this unit. He held strong internal urges (motivation) to innovate and solve problems, his unit’s performance had been mediocre within F&D and this development was a ‘reply to the exigencies of the situation” (Stones 2005:101). When it comes to the rationalisation of action, agents draw on conjunctually-specific structures, and general dispositions, these are both pluralistic and often pre-reflexive. Here this can be interpreted that David’s ordering of priorities (risk benefit analysis) is “greatly affected by what the perceptions of the empirical and substantive terrain of action appear to indicate about the chances of success, and about the probable attendant costs, associated with particular projects” (Stones 2005:103). In other words, he weighed up the sociocultural conditions of action and the business priorities to make a decision to act in a particular manner, again drawing on culture as represented in the Service Ethos and unit performance aligned to the BSP.

#### 5.4.4 Values under pressure and cultural change

Having revealed evidence for an alignment between the values in the corporate Service Ethos and the agents-in-focus and shown how cultural norms facilitate challenge, it should not be taken for granted that this is some sugar-coated utopia. Nor should it be assumed that culture is fixed, as has been shown in the literature review, culture is acknowledged as malleable and pliable (Archer 1985; Harris and Ogbonna 2002). The values and rhetoric are regularly put under pressure. When discussing the reality of the corporate espoused values, it is necessary to take a critical perspective (Ogbor 2000), these values regularly come under pressure.

Interviews revealed that not all values can be maintained and enacted in all circumstances, when questioned about the reality of the rhetoric, and whether the values were ‘real’ Freida acknowledged, “Not really ... yes and no (pause) Part yes – living trust, being host, being, certainly that is real. That is what we do. That is the core of what we do” (Freida Interview). She continued to reflect on the innovation value, “It is a great idea, but you know ... innovative, doing something new, something fresh – thinking outside the box, creativity. That is great! But really! When do we have the time to do that?” (Freida Interview)

[1.12.25+]. The strategic context for this GM is operating a city centre hotel with relatively low room rates, compromised brand standards, and an owner in administration! So, her ordering of priorities and agency is focussed on the basic service provision, keeping training regime for the Service Ethos implemented (which had lapsed in the unit before her arrival) and focusing on customer satisfaction within a tired building which requires investment. Grant also acknowledged the challenge of innovation, “I don’t think we are innovative, I don’t think, as a brand, we are innovative at all really.” (Grant Interview) [28.20]. When reminded by the interviewer that according to publicity materials, innovation was one of the espoused values, and the brands was all about style and design, Grant replied,

Well a lot of patterned chairs ... a lot of patterned chairs are dreadful. ... But that is stylish and that is innovative.? How does that work? They are new ... the purple chairs are all new ... they are my chairs. So we don’t really adhere to that particular stylish thing. ... It is a style thing. When we are investing money – and we are maybe not always being as – we are not trying to be cutting edge. (Grant Interview) [29.54]

Referring to the stylish atrium features present in several HotelCo units in UK and Europe, Grant continued.

Yes – so the [atrium feature] but these are just ... these are fool’s gold, loose fortunes... You can understand why we have gone from things like the [atrium feature] which has cost us an enormous amount of money – to be practical. But We may have ... we have lost a bit of style in that transition. (Grant Interview) [29.54]

These GMs both acknowledged that features of high design and style (which typified HotelCo brand) were expensive, “these are fool’s gold and loose a fortune” (Grant Interview) and were unsustainable in hard economic times. So, for some GMs this has tarnished the authenticity and ability to live this corporate value, although some GMs such as David as we have seen above hold fast to innovation value as a justification for acting otherwise.

Other situations were revealed of the difficulty in maintaining and living the values espoused by HotelGroup. When hard commercial decisions have to be made, where there is sensitive management of stakeholders in circumstances where corporate interests are not served by being transparent and honest. The corporate rhetoric emphasises caring amongst several values or traits that are at the core of the company ethos, but when asked to reflect

on culture and ‘what matters round here’ one GM recognised the challenges, recounting a strategic initiative relating to standard operating practices in housekeeping and the introduction of a new system, this resulted in redundancies in his unit (mentioned earlier in relation to buffering). Grant reflected that this had been a difficult situation (as relayed earlier) and in his view not handled well by region. When contrasting this incident to the value base of the company, with a sense of regret he confirmed, the company had fallen short of its aspired values.

There was definitely ... yes caring was ... and at some point we have cared. Yes definitely. We have cared. [emphasis on the past tense]. We are not as caring – now. But the business has to survive. (Grant Interview) [1.00.33].

Trust is a key corporate value and was evident in the interview discussions and logs but was less often articulated. Even though it is important, it can be more difficult to maintain in difficult times. Trust is important in enabling strategic agency (Mantere 2008) and in maintaining relationships in strategic alliances between joint venture stakeholders (Coad and Glyptis 2014; Langfield-Smith 2008), which typifies owners and operators in the hotel industry, yet this is often where trust is put under most pressure. An example of when the values of trust and transparency were strained was provided by Grant. In a diary log he described an ‘awkward’ meeting with potential new owners, where he was prevented from sharing full information. The context for this episode was that Grant’s unit is for sale and HotelCo do not want to reveal the established refurbishment and investment plans (which have been budgeted).

What we are hoping to achieve as a company is that through not over exposing our intentions we can seek financial support from the new ownership – the new owning company – to help us part fund our planned investment and redevelopment of the building.

So, I am unable to confirm or deny that we have plans in place. Although we have plans in place for all of these areas – most of it funded – and I can’t commit to that. It is about making sure that we keep as many eggs in our basket as possible.

That was quite... (sigh) ...it is quite awkward because you ... it is obvious that we need to spend this money. It is obvious that I ... to anyone ... that these areas are in need of refurbishment. But we can’t commit to that at this stage. I just think that game is a bit difficult to play. I understand the reasons for it, but it is a bit awkward. (Grant Log 22/1/15)

For Grant this was an issue of honesty and trust and it made him feel very uncomfortable. Neville also acknowledged the importance of trust and how difficult trading conditions can erode trust between owners, suppliers and customers.

when I moved here they were in administration. ... Nobody trusted us. Nobody believed us. That was interesting, very interesting. It is a thing that rarely happens. (Neville Interview) [44.09]

These are examples where trust has been lost or strained in the process of business, in particular in relation to key stakeholders. Both GMs in these circumstances, displayed diplomacy and boundary spanning, understanding the strategic context and the necessary power dynamics and relational factors at play, both acted in HotelCo's best interests in line with the obligations of their role and position. These examples reveal where values butt up against the harsh realities of business exigencies, costs cutting, and the hard decisions associated with restructuring. In such circumstances, GMs demonstrate a pragmatic approach of self-defence, compliance, defiance and enact micro buffering as explained earlier. What is notable is that there was no evidence to infer that this compromise extended to the value associated with Hospitality. This is not surprising as has been shown the value of Hospitality or Hospitableness, sits at the heart of the HotelCo's purpose and GMs' own personal traits. These examples of values under pressure also point towards the inevitability that culture will evolve over time through the reciprocal actions of the agents in context. The manner in which GMs, regional staff and leaders engage with the values through their actions will drive, subtly reinforce and institutionalise cultural norms, but also where they do not keep the values maintained through application in action, these norms will evolve and change.

The literature review revealed the possibility of the pliable and malleable quality of culture and also acknowledged the impact of leaders on organisational culture (Alvesson 2002; Martin 2002). In addition, the preceding testimony has demonstrated strategic change initiatives, impacting upon the agency of GMs and the values of the organisation. Through interpretive analysis the qualitative data revealed a narrative of change and it is interesting to explore how structural changes, and the change of strategy and senior leaders can impact upon the organisational culture. It is important to keep in mind the strategic context for action, as described earlier HotelGroup has seen huge change with the centralisation of RM (which is the key strategic initiative at the centre of this study).

The AVP (Robert) explained the changes at the top of the institution. “The shakeup” involved a lot of outsiders on the executive board, “so there are new senior management and a new style” (Robert interviewer notes). He acknowledged this had driven a significant change, the new organisation was more “process driven”, with less subjectivity in decision making and “clearer line of sight into the middle levels”. In the past there had been a “confusion between what was important and urgent” (Robert Interview). With new management, there has been a move towards professionalisation and standardisation to improve brand standards compliance and cut costs as has been mentioned. There have been a series of strategic initiatives, in addition to Centralisation of Revenue Function. These changes include, centralisation of procurement and contracting (e.g. Health and Safety compliance audit, national butchery contracts), centralisation of finance and accounting function and clustering of Human Resource (HR) function. These strategic initiatives have dual purpose to improve cost control, reduce costs and simultaneously raise compliance to brand standards. The cumulative effect of these changes has potentially impacted the organisation culture and also the role and work of GMs.

All GMs acknowledge the change in culture was linked to the change in leadership, and that it can be observed that this changed the manner in which they ordered priorities and exerted their agency. Gordon described the change as he had experienced it.

It is changing. It is changing, and as I said ... when I joined, and I first worked with HotelCo back in '99 or 2000 it was a company of ‘people’ and now I think it is a company of ‘positions’; people to positions. (Gordon Interview) [55.12]

Jeff characterised the change as a move to more corporate professional perspective, there was a clear theme of a change across all GM data, which could be characterised as a move from patronage to professionalism, combined with changes to review and promotion processes. Jeff was a fan of the new CEO (HM) but also had the greatest respect for the founder RJ.

I ... don’t want to criticise anything [RJ] has ever done, because he created something that very few people have done. Whilst he had the ambition to run a big chain I think he used to know all the GMs by a first-name basis. He used to pick up the phone and call all the GMs himself. [47.42] But we have aligned ourselves ... we have become a lot more corporate in our strategy. So we are all pulling in the same direction. (Jeff Interview) [48.32]

Jeff continued to explain that with the new leadership came a new set of priorities and expectations about how the business would operate. They introduced a performance management culture and better maintenance of brand standards. Nigel typified RJ as the leader of the old guard and acknowledged that change was needed and more forward-looking modern approach, with “a more professional set of values” (Nigel Interview) [P2 0.48]. Amid this change there is evidence of deliberate steps taken by the new leadership to articulate and inculcate certain values. The new CEO championed a relaunching of the values, however at the core of this remained the focus on hospitality and being a host to the guests, it was notable that there was no cynicism or compromise reported in the GM testimony in relation to this core value.

In summary, within the context of the case study organisation, the “Service Ethos” represents a widely understood and acknowledged cultural schema, that unequivocally embodied the rules and resources (Giddens 1984) that guided the agency of GMs in this study. All GMs demonstrated an understanding and engagement with this, not as synthetic, but as an authentic set of guiding principles. GMs drew on the culture to make decisions and to maintain their own ontological security when resisting edicts and initiatives. They utilised it in a pragmatic fashion to drive improvement in unit performance and justify their actions. Many lived by the values of the organisation, as these aligned with their own, but also accepted that some of these could be put under pressure in difficult circumstances. At such times GMs drew on their own personal dispositions to guide their actions and reorder their priorities. All GMs acknowledged that external macro forces (and the resultant strategic changes in HotelCo) impacted upon the norms and expectations of their role. The change of leaders impacted upon the ordering of priorities of the GMs, as agents-in-focus in this study, they demonstrated accomplished knowledgeable agency, drawing upon culturally imbued internal and external structures.

### **5.5 Summary and conclusions**

The strategic change experienced in HotelCo is driven by macro forces relating to sector changes and intensification of competition so is worthy of exploration. The strategic initiative to centralise revenue management in HotelGroup is pre-eminently important for competitive advantage, and cuts to the core of the hotel unit operation and success. Importantly, RM sits at the centre of the GMs’ role and purpose, so these changes affect

their accountability and autonomy. Thus, this strategic initiative is important and impactful at a macro level, for the global success of HotelGroup, at a meso level for HotelCo's units in UK and Ireland, and at a micro level for the role and position practice relations of GMs the agent-in-focus. Alongside this, changes to leadership, organisational structures (centralising or clustering other functional areas), control practices and institutional priorities impact upon the GMs' day to day decision and practices. GMs' praxis takes place within a cultural context, that is sedimented in the Service Ethos and recursively reproduced through the actions of agents in the field. Four key findings emerge from this study.

### 5.5.1 Middle manager agency and strategy implementation

The centralisation of revenue management function changed the roles and position practice relations within the units and the central RM (cluster revenue office). Moving the locus of information and control to the regional office, changed power dynamics and require the restructuring of roles in the unit and the establishment of new practices. The GMs micro-strategising involved nuanced compliance and resistance, the negotiation of interpersonal relations and the establishment of new position practices. Within these daily time-bound critical decisions, team dynamics were occasionally strained, and contests of accountability imposed upon dialectic relations.

The day to day practice for GMs involved mediating these challenges, recognising that the structures of legitimation and signification are changed, they navigated the power asymmetries, engendering team work and mutual respect between central revenue office and their unit teams. In doing so they would often resist central edicts and CRM recommendations if they did not agree, because ultimately it is the GMs who are held accountable for the revenue performance of the unit not the central office. Their ability to resist was affected by their own skills, knowledge and experience and they were always able to articulate a rationale grounded in business logic and/or personal ethics and values. They would often draw upon the organisational culture, manifest in the Service Ethos and values, in addition to drawing upon their own experience and personal dispositions. Utilising a strong structuration theory lens for this study, facilitated the explicit recognition of agents' accomplished practice, their analysis of the strategic terrain and the strategic context, their ability draw upon structures through rules and resources. Drawing upon

norms and common understandings of what is important utilising power to leverage allocative and authoritative resources. Some GMs were more accomplished at this micro-strategising than others, but all displayed both compliance and resistance at various times.

### 5.5.2 Middle Manager Strategic Agency - Micro-Buffering

One emergent theme in the data exposed a new kind of micro-strategising, a form of MM agency not previously reported in published extant literature. This behaviour is typified as micro-buffering, that is protective behaviours, resisting or mitigating negative impacts of strategy implementation at an individual level. Considered in the context of an integrated view of managerial roles (Mintzberg 1973;1980), this behaviour is different to the buffering identified as one of six boundary-spanning activities (Pryor and Henley 2018). This MM micro-buffering is enacted at the nexus of strategic change initiatives and the day to day operational activities and involves shielding, protecting and defending people within the GMs' network of position practice relations, in particular members of the unit teams.

### 5.5.3 Structuration of the Hotel GM role

The GM role is characterised as a key position in the sector. Identified as a distinct 'position practice' encompassing multifarious tasks and duties and offering institutionalised identities, rights and obligations to its incumbents. This role is deeply institutionalised containing sedimented structures of power, significance and legitimation. Yet the data revealed the structuration processes at play, in relation to the functional tasks and obligations of the role and its position in a network of relations. Strategic initiatives changed the temporal and spatial facets of agency, changing the autonomy of GMs and exerting a potentially reductionist force on the role. There was evidence that the role is evolving from the strongly agentic Management Director role of the Hotel General Manager, to a diminished operationally focussed Hotel Manager. These changes raise questions about the evolution of the GM role, their position practice relations and potential unintended consequences of the change for the practice of strategy implementation. These unintended consequences could be that the loss of agentic power, will reduce the beneficial effect of this strategic central role.

### 5.5.4 Culture and SST

For all GMs in this study the corporate service culture, embodied in the Service Ethos, was the single most important manifestation of organisational culture. It encompassed the espoused values and through training, monitoring and perpetual communication, providing the guiding principles for behaviour in HotelCo. GMs drew upon the organisational culture in their day to day practice as a source of ontological security and as a rationale for action. They drew upon culture in an instrumental fashion to improve performance in their unit and utilised the values therein as systems of signification and legitimation. The culture was implicated in external structures, and through inculcation and natural affinity embedded in internal structures, conjunctually conceived and naturally present in personal dispositions, and implicated in action. Culture was acknowledged as pliable although the main corporate values remain, subtle changes were observed in the shared understanding of priorities and interpretive schema that guide action and behaviour in HotelCo.

The following, final chapter will synthesise this transdisciplinary study of middle manager agency to present the contributions to knowledge and propose avenues for future research.

## Chapter 6 – Conclusion and Contribution

### 6.1 Introduction

This study adopted a transdisciplinary approach drawing upon a wide range of literature to understand the role of middle managers in strategy implementation. Transdisciplinarity provides a holistic perspective that acknowledges the complexity of daily life in organisations. This structuration study applies a practice perspective, in line with strategy as practice (SaP), utilising social theory built from Giddens' Structuration Theory (ST), namely Strong Structuration Theory (SST) developed and promoted by Professor Rob Stones. The combination of multiple bodies of literature and theoretical perspectives makes this research and its findings distinctive. The question that has driven this research is *how do middle managers implement strategy through their day-to-day practice and what role does culture play in their agency?* Culture, and organisational culture in particular, is a domain of organisational studies replete with competing theories and disciplinary perspectives. Culture is an important concept that is pertinent in a service organisational setting even though it is acknowledged as difficult to operationalise. SST helps to overcome the challenge of utilising ST, with its ontology in situ (i.e. contextual knowledge) which addresses the abstract nature of ST. In addition, a cultural perspective offers a new dimension to SST. As such, a culturally augmented form of SST was developed and employed, building on Stones' own proposition that SST is 'ecumenical'<sup>1</sup> (Stones and Jack 2016:1147). Navigating this broad intellectual terrain through a social constructionism lens, resulted in a deeply situated understanding of MM agency.

### 6.2 Grounding the contribution.

Before elaborating the contributions to knowledge emanating from this study, it is useful to briefly reflect on the intellectual space and place of this research. Strategy implementation is an important and valid topic for exploration bearing in mind the difficulty it poses to organisations (Aaltinen and Ivalko 2002; Okumus and Roper 1998). SaP is a useful perspective with which to address the research question because it offers

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<sup>1</sup> Stones himself uses this ecclesiastical trope to encourage and validate the use of "a combination of theories" with SST to address the question at hand (Stones and Jack 2016:1147).

an alternative to orthodox strategic theory, which emphasises the institutional realm and is dominated by generalisable but parsimonious theories (Jarzabkowski and Whittington 2008). In addition, it integrates social theories to herald an ontological and epistemological change of emphasis (Whittington 2011b). SaP reconceptualises strategy as socially constructed through the interactions of individuals within and outside the organisation (Golsorkhi et al 2011). In particular, it recognises the agentic power of middle managers and broadens the intellectual gaze away from top executives. MM are recognised as pivotal to strategy implementation (Atkinson 2006; Bharwani and Talib 2017; Floyd and Wooldridge 2017; Rouleau 2005) and the GM role, in particular, is unique in the international hotel industry (Ladkin 1996; Roper 2018). Based on an extensive review of the literature, it is asserted that their contextually situated agency has not been studied in detail.

Stones' Strong Structuration Theory (SST) was utilised because it offers a practical bridge between structure and agency, macro and micro perspectives, thereby addressing the criticisms of Giddens' original Structuration Theory (ST). By giving attention to both structure and agency, SST addresses the risk of micro-isolationism that is associated with SaP (Elbasha and Wright 2017), which is an important contribution of this study. Burgelman et al (2018) acknowledge the risks of SaP, that a focus on detail obscures the strategic and the important. With reference to Pettigrew, Mantere warns that researchers should 'avoid watching individuals flipping hamburgers' (2005:158). SST provided a bridge between the micro and macro perspectives, by providing an ontology in situ thereby avoiding micro-isolationism. SST also enabled the focus on individual agents, whilst facilitating the integration of culture into a theoretical framework adapted for use here.

As has been shown in chapter 3, culture is multifaceted. In this framework, the cultural influences that shape external and internal structures cannot be compartmentalised and characterised definitively as Service culture, Industry culture, Occupation culture or Organisational culture, because these sources of meaning emerge for agents, refract upon each other (and also disappear) as if pieces in a kaleidoscope. For example, Geertz (1973) and later Palmer (1998; 2009) acknowledge the messy and incomplete nature of any understanding of the lived experience. As Geertz states,

for, as in a kaleidoscope, one always sees the chips distributed in some pattern, however ill-formed or irregular. But, as in a kaleidoscope, they are detachable from these structures and arrangeable into different ones of a similar sort. (Geertz 1973: 353, original emphasis).

This metaphor was useful to understand that each middle manager will draw upon culture (whatever its source or characterisation) in a uniquely personal manner. What CASST achieves is to provide a framework to elicit an articulation of cultural influences and stimulate the discursive consciousness of participants in any study of managerial agency. CASST provides a contribution to extant theory by signposting explicitly the role of culture in agency connecting the cultural milieu to structure and agency.

In comparison, hospitality management research is dominated by hypothetico-deductive studies, so offering an interpretive sociocultural perspective extends and complements the current extant literature (Lugosi, Lynch and Morrison 2009). These varied and philosophically diverse bodies of work are drawn together by the researcher to offer a less bounded transdisciplinary perspective (Bernstein 2015; Whittington 2011a) on the implementation of strategic change and the role of middle managers. One of the unique aspects of this research is how these intellectual and structural domains overlap and are drawn together to offer a unique perspective on the role of middle managers' strategic agency. This transdisciplinary approach underpins the contributions which will now be summarised to postulate new knowledge and methods in the study of MM agency.

### **6.3 Contributions to knowledge**

The proposed noteworthy contributions to knowledge provide new insight on strategy implementation and the role of MM. These constitute theoretical, methodological and practical contributions which will have benefits for research and practice moving forward. The combination of a practice perspective and structurationist approach supports two analytically separate but interconnected contributions that demonstrate the theoretical and empirical utility of SST achieving objective 4 of this study. Firstly, the development of a nascent culturally augmented theory of structuration is proposed with a view to demonstrating an important and original theoretical contribution to knowledge. Secondly, this study offers methodological insight for organisational research and SaP research in particular from the experiential reflection on the use of Stones' SST. Utilising these

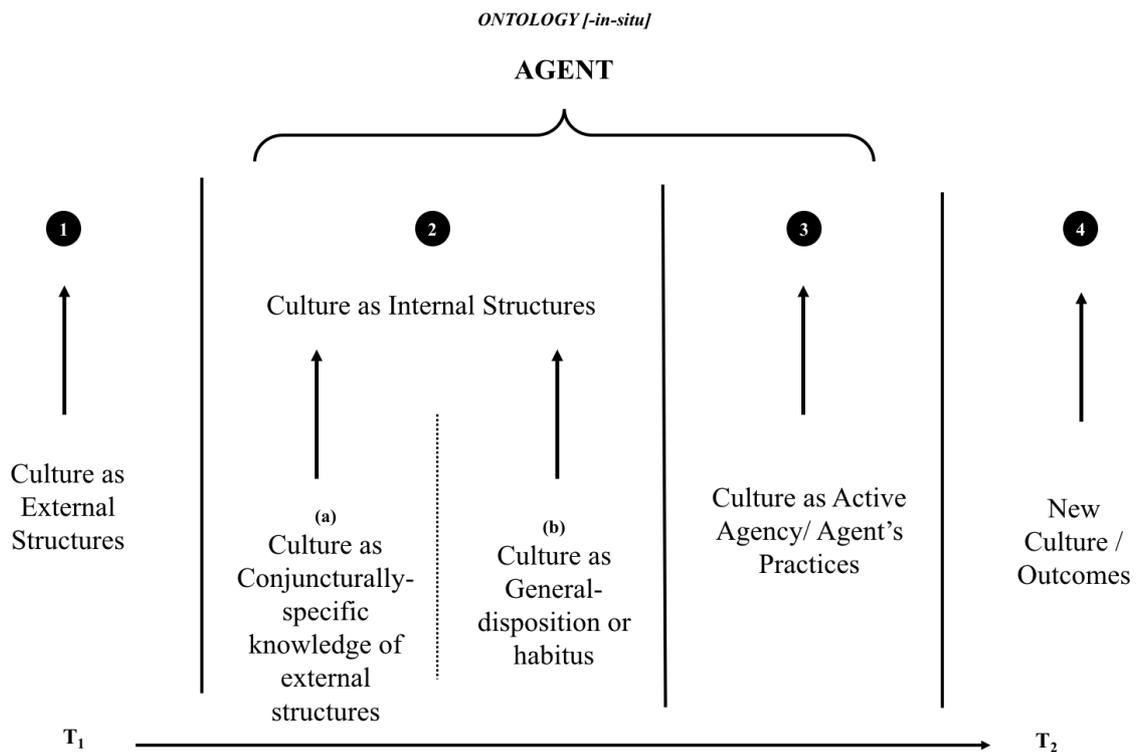
theoretical and methodological tools facilitated an exploration of the research question and revealed three key insights into MM strategic agency and Hotel GMs' role in particular. The third contribution reveals how MMs implement strategy through their day-to-day actions and what role culture plays in their agency. In addition, the analysis of their agency reveals acts of protection and buffering unique to the agents' position practice relations; this has been termed 'micro-buffering' and is the fourth contribution to knowledge. The final contribution relates to the change in the GM role that has resulted from structural changes in the industry, which has practical implications for the professional role of the Hotel General Manager.

### 6.3.1 Culturally augmented Strong Structuration Theory (CASST)

A theoretical contribution is advanced in this thesis that integrates culture into Stones' SST, thereby making explicit the role of culture in agency. Integrating sociological theory (e.g. politics, power and norms) and anthropological constructs (such as meaning making and group identity), culture is conceptually implicated in the structures of signification, domination and legitimation. Modelling the approach of Sydow (1998), it was shown in Chapter 3 (section 3.6.1) how culture could be conceived as a modality of structuration, through the active agency of middle managers, who draw on culture as an authoritative resource and as a rule of legitimation and significance. Culture as an "assemblage of meanings and meaning making processes" (Lewis 2002:39) provides rules of signification and supports sensemaking in strategy (Rouleau & Balogun 2011) and "talk-in-interaction" (Sydow 1998:37). Culture is embedded in power structures and roles; drawing on their own agentic capability and knowledgeability, agents can exert power over resources and people i.e. allocative and authoritative (Giddens 1984; Parker 2006). This power is embedded in their role, but also their own capabilities as has been shown. Organisational culture also provides the structures of legitimation for the agent in the field by providing mechanisms "for ordering his behaviour" (Geertz 1973:44). These expectations and norms are internalised in "phenomenologically inflected 'stocks of knowledge' about the external context and conditions of action" (Stones 2005:17). It is possible to track the dimensions of structure into the quadripartite model and map culture's role in the four stages of the Strong Structuration process, presenting and defending a culturally augmented quadripartite framework (see figure 6.1 below).

Stones SST provides a deferential development of Giddens original ST, by addressing the criticisms of Giddens and synthesising theories associated with social psychology and symbolic interactionism. He defends against Archer’s claims of conflation by replacing Giddens’ ontology in general with an ontology-in-situ, elaborating four analytically separate elements; External Structures, Internal Structures, Action and Outcomes, (see Section 3.5 page 80 for full explication). In this thesis the quadripartite framework has been theoretically augmented by the researcher with culture, in line with Stones’ ‘ecumenical’ aspirations (Stones and Jack 2016:1147). The theoretical development of this culturally augmented strong structuration theory was laid bare in section 3.6 (page 94) but it is useful to reprise the core arguments here to support this creative contribution.

Figure 6.1 Culturally Augmented Strong Structuration Theory (CASST)



The many fractals in culture’s kaleidoscope are captured in CASST. Service and organisational culture is embedded in external structures as an enduring pattern of normative systems of knowing and acting, that are to a lesser or greater extent embodied in action and interaction (Alvesson 2002; Hays 1994; Stones 2005). In keeping with

Stones' ontology in-situ, culture is embedded in position practice relations of GMs within this specific social system, thereby providing a bridge or link between structure and agency (Coad and Glyptis 2014; Cohen 1989). Over time through the interaction of processes of education and experience these roles become institutionalised (in the form of occupational cultures) and thus predate the agent. In this institutional setting, like many occupations (Palmer, Cooper and Burns 2010; Schein 2004), Hotel GMs (the agents in focus) accept, but also amend, pre-existing rights and obligations of their role. This adaptation takes place through hermeneutic reflexivity blending their own general dispositions (*habitus*) with this conjunctural knowledge to take action and exert agency. The outcome of this agency can be to perpetuate culturally embedded roles and behaviours, or to adapt and change the expectations and obligations ultimately rooted in these institutions in a cycle of structuration. The conceptual development of this culturally imbued structuration framework is a significant theoretical contribution of this study.

CASST works to enable the analytical separation of structure and agency, with a focus on culture, thereby making explicit the role of culture in MM strategic agency. By the development and use of CASST in this thesis, the researcher was able to track the influence of culture in a manner not previously achieved or published. CASST facilitated the tracking of culture and through discursive practices exposed the conjunctural knowledge of the agent-in-focus in relation to cultural norms and structures of signification. For example, it revealed how culture empowered agents to act otherwise, in section 5.4.3 (page 203). Many MMs reported their own deviant behaviour, revealing culturally embedded norms associated with the MM position practices to challenge and resist. This resistance (characterised here as 'beneficial deviance') is a key feature of strategy implementation in this study, which is arguably a sociocultural act that perpetuated and extended the boundaries of cultural norms and expectations. CASST also exposed how agents in the field drew on interpretive schema including values and norms, both personal and organisational, to rationalise their decisions and their own narratives of resistance. Through the combination of analytical bracketing in the structuration cycle and the discursive consciousness revealed through diaries and interviews, CASST uncovered the role of culture in MM strategic implementation.

CASST is an original framework that was developed and tested in this research project, revealing its efficacy through use. CASST provides a new theoretical framework to support

the study of culture in any setting, so future management research could employ this new framework in other sociocultural contexts to utilise its ability to expose active agency and the role of culture and prove its worth. It is anticipated that CASST will be the spark to ignite future SST research activity not just in SaP, but also in other domains of organisational research.

### 6.3.2 Methodological contribution

This study has adopted a SaP perspective and utilised Stones' SST as a theoretical and methodological tool. This combination makes this study unique and shows its potential to contribute to cumulative enquiry in this field and promote methodological advancement. The comprehensive literature review revealed few studies that have utilised Stones' composite research strategy especially in both the design and analysis of qualitative research. Only a few researchers in the field of management control and strategy have utilised SST<sup>2</sup>. Jack and Kholeif (2007) and Coad and Herbert (2009) applied Stones to previously gathered data. Feeney and Pierce (2016) used SST in the original analysis of their data, and Elbasha and Wright (2017) advocated the use of SST in SaP research to overcome the criticism of 'micro-isolationism. They propose that "an SST lens centers position-practice relations in organizational settings, locating strategic agency within organization-specific context" (Elbasha and Wright 2017:123). As yet their methodological learning and empirical findings have not been published therefore, this study is at the forefront of knowledge in this area.

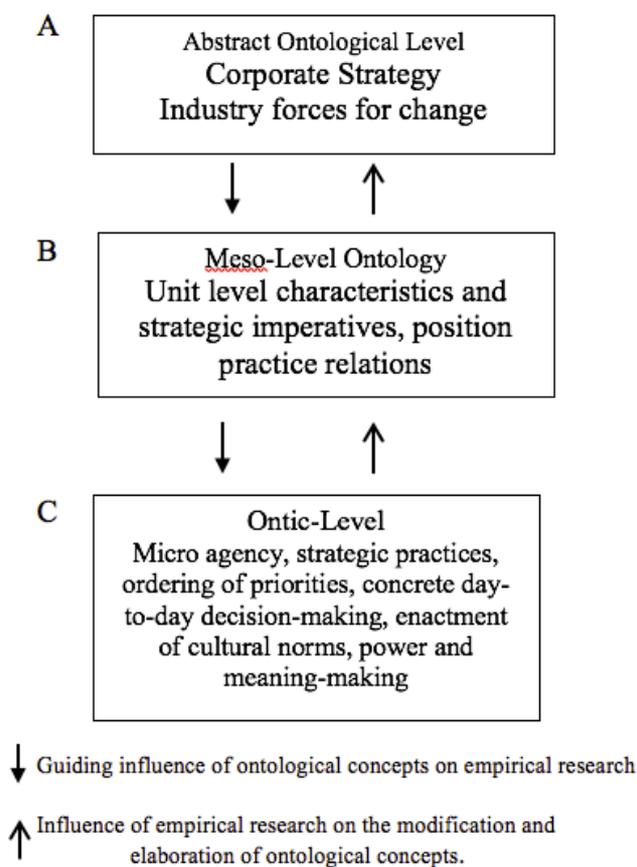
Stones advocates a composite research strategy (CRS), which provides a practical development of Giddens' original approach addressing "a number of decisive limitations of Giddens's own handling of the notion of methodological bracketing" (Stones 2005:121). In the data analysis phase Stones advocates four recurrent steps (this is presented in box 4.1 see section 4.5.2) which focus the researcher on the agents' conduct analysis before progressing to consider the context analysis providing an analytical sign post to the quadripartite process of structuration. This process supports the analytical separation of structure and agency. Through the adoption of the composite research strategy, the context

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<sup>2</sup> Stones' SST has also been widely utilised in health studies, most notably by Prof Trisha Greenhalgh in relation to the use of IT in health care, e.g. Greenhalgh, Stones and Swinglehurst (2014) and Greenhalgh, Wherton, Shaw et al (2019).

and conduct analysis of agents is revealed and thus SST provides a window into micro-agency. Strategy as practice is a deeply situated activity, the reflective aspect of this research was the key to bridging the external and internal structures, unlocked by the utilisation of an ontological sliding scale (see chapter 4 figure 4.1). The use of diaries in the data collection (which in itself is novel), in addition to semi-structured interviews, elicited testimony from the participants that could be empirically mapped against this ontological scale, connecting the macros forces to the micro actions.

Fig 6.2 Knowledgeability of the agents-in-focus mapped on the ontological sliding scale.



The sliding ontological scale made explicit different types of knowledge, at different levels of abstraction within the agents’ contextual frame. At an abstract level the agent-in-focus is aware (to a lesser or greater extent) of the corporate strategic intent and its purposes, the power relations and espoused values and priorities of leaders and their expectations for the agents-in-focus. At a meso-level the agent understands the implications of this for his/her rights and obligations and degrees of freedom for action and local agency within his unit. This in turn will inform his ontic, concrete actions, i.e. his day-to-day practice. In this study

these levels have been exposed through the rich description of strategic context and strategic conduct for the first time in this manner. Therefore, in this study the efficacy of SST and CRS has been demonstrated through use, providing valid and important methodological learning, thus making a significant contribution for SaP scholars. The ontological sliding scale in particular, provides a powerful antidote to micro-isolationism recognised as a potential weakness of SaP research (Burgelman et al 2018; Seidl and Whittington 2014) and thus is advocated for future SAP research. Stones' SST and CASST in particular (developed in this thesis by the researcher), has the potential to make a powerful contribution to methodology in practice-based research in organisations.

Methodologically, in this research it has been possible to link the micro-agency of MM to the macro forces of change in the sector and to demonstrate the structuration processes at play. Thus, overcoming the problem of micro-isolationism in SaP research (the results of which will be revealed in the following sections). This study therefore makes a contribution by demonstrating how Stones' CRS can be used incorporating the ontological sliding scale can reveal the practice of strategy. Showing it is possible to reveal micro agency in context to better understand the practice of strategy implementation and MM agency, overcoming micro-isolationism. In this manner this study makes a methodological contribution to management studies and SaP in particular.

### 6.3.3 MM Strategy Implementation and the role of culture

Analysis of the findings in this study reveal agency in the particular (i.e. specific to GMs) but also raises the possibility of signposting MM agency in general and forms the basis of a contribution to knowledge in this arena (Easterby et al 2004; Locke & Golden-Biddle 1997). In contrast to the existing portrayal of MM as mere vessels of corporate strategy, this study acknowledges them as more than carriers and enactors of strategic intent developed elsewhere. These GMs displayed accomplished agentic behaviour to mediate the implementation of a centralised revenue management function and other strategic structural changes. Although they recognised the challenges of implementing the change the examples of strategically-aligned agency were multiple. There were, however, also many examples where GMs resisted, circumvented or adapted implementation in practice. The challenges experienced by these agents-in-focus related to the spatial and temporal differences created by the relocation of RM data analysis, information control and decision

making that resulted in new roles and position practices within the unit and the central revenue office. GMs reported their own loss of control (no longer line managing key colleagues), reduction of leverage (pricing strategies and revenue decisions required action through the remote office and therefore could not be enacted by unit alone) and compromised commitment and lack of support for their own unit's priorities and objectives. GMs also reported beneficial effects, taking the emotion out of the property in relation to RM, bringing more objectivity, driving rates up in some units but also pushing units to sell at a lower price when demand was low. Also, some GMs reported great team work despite geographic distance, however this required expert and subtle navigation and mediation by the GMs. These temporal and spatial changes in the strategic context still allowed for active agency at key transmission points of strategy, revealing how managers adapted to changes whilst maintaining and exerting more agency than would be superficially evident.

Despite this reduction in unit autonomy GMs remained accountable for the results of the rate decisions on their unit performance. There were many examples of resistance or adaptation in this area of decision making that was pre-eminently important. In all cases GMs were able to reveal the narrative of resistance, their discursive consciousness exposed their motivations for action and their ordering of priorities. In all cases GMs' drew upon their self-confident knowledge and skills, their experience and personal dispositions to make decisions, which were communicated with a clear business logic. There was no evidence of middle managers resistance, countervailing or defeating the strategic initiatives. On the contrary GMs resistance was motivated by strategic or human resource considerations to ultimately improve the performance of their unit. Thus, the resistance displayed here has been typified as 'beneficial deviance', strategic implementation practices that divert from the corporate strategic initiatives, that may breach operating standards and protocols, but have a beneficial effect in the strategic context (Lugosi 2019; Spreitzer and Soehnshein 2004). Thus, the contribution here is to observe, denominate and elaborate 'beneficial deviance', which encompasses actions that are both divergent and beneficial to the organisation and its strategic aspirations, this emergent concept would benefit from further theorising and field testing. It is possible to offer a conjecture, utilising abductive logic (Timmermans and Tavory 2012), that such deviance is likely to be observed in MMs in other strategic implementation settings. This notion, or theory of

managerial agency, incorporating beneficial deviance is a new and intriguing finding that forms the basis of a contribution to MM theory emanating from this study.

Due to the nature of the research design, the GMs were prompted to reflect and this process revealed their discursive practice, often articulated through narratives of resistance. These narratives invariably exposed the impact of culture on GM agency and culture was implicated in managerial agency throughout this study. GMs interview data revealed the alignment between corporate espoused values and their own personal dispositions, in the diary logs GMs drew upon these to rationalise their actions and guide their decisions. In particular there was evidence that resistance, or rather challenge, was accepted as a cultural norm and thus GMs were empowered and supported (through the ontological security this provided) to make decisions rejecting or adapting institutional edicts. Notably, GMs grounded their narratives of action in culture, they were also invariably pegged to the local strategic priorities, which were aligned to corporate objectives through the BSP. In addition to bridging the disjuncture between central and local knowledge, GMs experienced the pull of different loyalties, the difficulty of complying with strategic initiatives while recognising the impact on their staff. Other strategic initiatives (clustering HRM, Financial Control, Procurement etc.) resulted in difficult situations for GMs (especially when it resulted in redundancies) and these fuelled further covert and overt resistance. In these cases, SST exposed managers drawing on their culturally imbued personal dispositions and resilience to cope.

Through analysis of this evidence it can be postulated that culture is implicated in MM agency and is a key resource (Giddens 1984) for MMs in the implementation of strategy. Although one must be cautious about claims made from a small-scale constructionist study (Easterby et al 2004), in this study, culture was implicated repeatedly in middle managers agency. No studies of micro agency have made this explicit link in the context of strategy implementation. It is important to recognise this link to culture, because often in the context of strategic change (particularly mergers and restructures) there are deliberate attempts at the management of cultural change (Alavi, Kayworth and Leidner 2006; Brubakk and Wilkinson 1996b; Peters and Waterman 1982). So this study extends our understanding of the role of culture in strategy implementation and makes a contribution to knowledge in an important area of management studies.

At the time of this research, the implementation of the centralisation initiative (RM) was relatively new and the associated position practice relations were developing within the network of agents in the field. It remains to be seen what the long-term effect is on the GMs role and position practice relations, but it is not unrealistic to expect that over time substructures and subcultures could emerge. New structures of signification, legitimation and power were evident and will evolve over time, potentially resulting in cultural dialectics and dysfunctional politics. These key differences between the old unit-based RM function and a central RM function include proximity to the customer and the strong service orientation prevalent in the unit. In addition, central RM are incentivised for regional revenue growth, not unit GOPPAR, this combined with the lack of local line management by the Hotel GM, could result in suboptimal decision making. There are temporal pressures on action influenced by the fact the CRM look after several units, thus their prioritisation of action cannot be fully aligned to a single unit as they are responsible for several units. Such internal organisational process changes and the establishment of new internal boundaries or tensions could have longer term unintended consequences.

This research sheds new light on the implications of centralisation that constitutes a contribution particular to applied hospitality research. These consequences have practical implications for centralisation initiatives in the hotel industry and the changing role of GMs which is discussed later. The contribution to our understanding of the strategic implementation of centralised RM in the hotel industry (offered by this research), could be complemented by more focussed larger scale research. Such a study could build on this project, reflecting on Mattimoe and Seal (2011), to assess the dialectic pressures in the operation of remote RM centres specifically and their impact on decision making. In addition, there is a need to understand the role, skills and agency of RM professionals, as this is a new and unique professional role in the International Hotel Industry.

#### 6.3.4 MM micro-buffering

A data driven/emergent theme in the research findings is related to GM buffering activity. Superficially, this activity appears to be similar to certain roles and behaviours identified in managerial role theory and in boundary spanning literature. However, the behaviours revealed in this study are subtly and yet significantly different to any existing published constructs. The notion of micro-buffering has not been previously described in published

literature, and as such is a significant contribution to knowledge. This buffering activity reveals Mintzberg's (1990) 'insightful face' of management, with evidence of intuition and sensitivity in interpersonal relations associated with strategy implementation. Several studies have applied and/or developed Mintzberg's roles in a hospitality or service industry setting (e.g. Brubakk and Wilkinson 1996a; Nebel and Ghei 1993), but there are no studies that have taken an agentic perspective nor revealed such behaviour in the context of strategy implementation. This buffering is similar to Floyd and Wooldridges' Championing, however, their championing behaviour was witnessed at a meso-level (aimed towards a stream of activities or business units) within the context of broad organisational or sector level studies (macro). The buffering revealed in this study involved "protecting, defending, safeguarding and shielding" other agents in the field, i.e. the agentic behaviour of 'buffering' directed *towards people* (usually subordinates). Therefore, this has been dubbed Micro-buffering because these micro level actions are directed toward other individuals (and departmental teams) at a micro level.

In the context of strategic change, the reflexive quality of the research process (through the use of diary logs) revealed managers motivations for action. These MMs were ethically driven, drawing on their own values to bring some humanity into the process and also in some cases, self-preservation (not in terms of position, but self-identity and ontological security). This agentic behaviour involved pushing at the boundaries of rules and processes, negotiating better terms (in the case of redundancy packages), forcing temporal changes, and absorbing the resource implications. Whilst this agency often crossed intra-institutional boundaries, working with centralised or cluster functions, for example standing up to edicts from regional head office, this was different to classic boundary spanning behaviours. It is different from the activity revealed in the boundary spanning literature (Bettencourt and Brown 2003; Cross, Ernst and Pasmore 2013; Ernst & Chrobot-Mason 2011; Prysor and Henley 2018). These behaviours are also distinct from that reported in SaP literature (Balogun and Rouleau 2017). Thus, this Micro-buffering is distinct in terms of the target, purpose and motivation for agency and its identification is an important contribution to knowledge.

Additional research would help to develop this concept further with reference to emotional labour constructs and to explore its quality and prevalence in a range of contextual settings.

It would seem sensible that this agentic behaviour will be more likely in ‘people’ orientated businesses, so more research in service industries would be a useful starting point for these developments.

### 6.3.5 Structuration of the GM role

Throughout this research the structuration processes of the GM role and agency was articulated by participants. The structural changes affected the agency of GMs, across a range of facets of the social systems that constitute a multi-unit international hotel organisation. It is reasonable to assume that this process would continue and become sedimented in new roles and position practices that will change the GM role for the future. This research reveals changes to the role and position of Hotel GMs previously unreported in academic literature. Although considered common knowledge amongst some more experienced hoteliers and hospitality practitioners, to the knowledge of the researcher, there have been no academic studies published in peer reviewed journals. This change in role relates to the scope, scale and status of Hotel GMs role and the continued growing importance of a business orientation and so will have practical implications for education, training and career paths of future GMs.

The multifarious nature of the GM role is confirmed and developed in this research, which reveals the structuration processes driven by strategic change. GMs exert agency across all functions and all business areas of the hotel. However, the tightening and extending of brand standards, the centralisation of RM and procurement have led to a reduction in the space for decision making. This key theme emerged in the data relating to the changing nature and status of the GM role. Changing from the high-status Hotel GM (the Managing Director of a complex multifaceted independent business) to a diminished Hotel Manager, more akin to Operations Director. This study provides further evidence about the change resulting from the disintegration of the corporate hotel industry (Roper 2018). The GM role has been acknowledged as unique by academic and practitioners alike, identified as a target job in the sector (Ladkin 1999; Roper 2018; Sarlas 2017), so is an important area for research. As the industry continues to consolidate with more independent operators joining consortia or adopting brand affiliation, the traditional role of GM may disappear from the international hotel industry and remain only in the independent sector. This has practical implications for career paths, for recruitment and education and training of the next

generation of Hotel GMs. There is a cautionary facet to these findings, that is the counteracting impacts of change in the GM role. Simultaneously the HotelCo benefitted from the GMs' active agency, including when GMs challenged top-down initiatives, arguably to the benefit of HotelCo and HotelGroup (typified above as Beneficial Deviance). However, the deskilling and diminution of the role of GM and the trend towards an HM role, could potentially inhibit challenge as a behaviour and consequently lose the important positive impacts of resistance. This has practical implications for the complex processes of change and innovation in organisations, if the active agency of middle managers is inhibited this could lead to less effective implementation of strategy moving forward.

Another feature of these findings was the observation of the need for a strong business orientation. In this study those GMs who demonstrated financial acumen, an understanding of the business and RM were more agentic in their behaviour and confident in their testimony. It was clear that all GMs whether they possessed these capabilities, or not, recognised that they are critical to success. The more experienced and successful GMs demonstrated these traits more than the less experienced. The traditional career route for GMs has been through F&B (Nebel, Lee and Vidakovic 1995), this research would imply that this may not help managers in the future. These skills in business development and revenue generation are critical alongside hospitableness, which has practical implications for education, training and development programmes. What is noticeable here is that these could be viewed as dialectically opposed, however, experienced and successful GMs appear to drive these counterposing objectives in tandem.

This study contributes to knowledge as it complements the work of Hodari and Sturman (2014) and Hodari, Turner and Sturman (2017) who focused on one aspect of GM agency, i.e. autonomy. They observed differences between independent and chain operations. What is arguably on display in HotelCo is a transition from what could be characterised as a group of independent hotel units operating under one flag, to a much more standardised chain operation. The contribution of this study is to reveal the structuration processes at play in this transition and the impact on the GM role. These findings complement previous studies, such as Brownell (1990) who observed GMs communication activities, those who have mapped career paths (Gebels, Pantelidis and Goss-Turner 2019; Ladkin 2002) or described the profile and traits of GMs (D'Annunzio-Green 2002; Jarawardena 2000).

Other studies have observed changes associated with technology, sales, distribution and IT (Altin 2017; Law and Jogaratnam 2005; Oskam and Zandberg 2016) in the context of GMs, but no study has reported in such a detailed and holistic manner. As such it can be argued that knowledge in this field is 'incomplete' (Easterby-Smith et al (2004:372)). Therefore, this study fills a gap in knowledge and provides a practical contribution due to the holistic and detailed view of the GM role, their capabilities and strategic practices, within the context of these sector changes. This study tenders practical implications for the profession and the sector in relation to development, retention and impact of the unique and critical role of Hotel General Manager.

In summary this study provides a series of important contributions to knowledge, of a theoretical, methodological and practical nature, and provides clear directions for future research, which will be summarised with research reflections.

#### **6.4 Reflections and opportunities for future research**

Reflecting on the research process reveals the value of the transdisciplinary approach. To support the exploration of the research question from the most appropriate epistemological and ontological point of view, the researcher utilized transdisciplinary tactics, because the individual bodies of knowledge were found to be inadequate in isolation (Locke and Golden-Biddle 1997). SST was found to be a powerful tool for understanding the processes of strategic change and SaP brought a practice perspective necessary to support an agentic micro-level study. Middle managers are unequivocally recognised as critical to strategy implementation and culture is acknowledged as the basis for human society, but few studies had brought together these constructs to provide a unique combination of worldviews and concepts to deliver a constructionist study. Recognising plurality in ontology and variety in epistemology, the researcher worked to combine the worlds of strategy implementation and control, management role theory, social theory, SaP and organisational culture in a field context of an international hospitality organisational setting. Any study that furthers our understanding of MM agency in a cultural context will contribute to learning in an important domain of managerial activity. As a result, this study is arguably unique and provides a series of contributions (Easterby-Smith et al 2004) to move research agendas forward.

Drawing together the points outlined above there are several future directions for research. Future research would benefit from the analytical clarity provided by CASST. This framework could be utilised to reveal the role of culture in agency in a range of settings, not just in SaP research, but other organisational studies where the research question requires overt recognition of culture in agency. Through further application the power and possibilities of this new framework can be revealed. In addition, the use of SST and Stones' CRS in particular can bring methodological benefit to practice research, by providing an ontological anchor to overcome the risks of micro-isolationism and bridging some of the fundamental dichotomies in social science research. Further research could explore and expand upon the micro-buffering activity revealed in this study. Future studies could develop this concept perhaps drawing upon emotional labour, to understand its prevalence and qualities in service industries. Broader studies from a range of organisational contexts could look for and expand upon the understanding of this activity and its impact on strategy implementation and organisational effectiveness. This study observes the change in the GM role and the potential loss of agency of hotel GMs. It would be beneficial to explore the impact this may have on this unique and critical role, through broader studies across the hotel industry. A useful avenue for research emanating from this study is the exploration of the success of RM structures and practices in the Hotel industry, in particular to explore the dialectical relationships of remote RM centres in hotel groups. In addition, there is a need to understand the new professional role of RM in the hotel industry. Although there has been a great deal of research relating to GMs, there is no published research to elucidate the new and unique professional role of RM.

The value of this study has been to provide new knowledge, new tools, new insights and new directions for research, not only at a micro level but also at institutional level and to recognise the interactions between these levels, in this way, it exemplifies the benefits of practical engagement with the empirical field.

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## **Appendix 1 - Access emails.**

### **1) Email wording for Area VP to General Managers**

Title - Notification of new research project taking place in *Company Name*.

Salutation if your choice

I have recently been approached by a researcher from the University of Brighton, who is carrying out research with General Managers in the Hotel industry. She has carried out some research in the past with *Company Name* and is back to continue the study of Strategy Implementation and the role of General Managers.

I fully support this research and am writing to let you know that Helen Atkinson will be contacting you all independently and directly to recruit as many of you as possible to her study. The research is particularly focussed on the decision making and practices of managers, who are clearly critical lynch pins in the implementation of strategy.

The research will be conducted anonymously, so your identities will not be revealed to me or any other member of staff in *Company Name*, but the general findings will be very useful for *Company Name* as we move towards more our strategy forward.

I hope that you can support this research, Helen will explain what is involved, so you can make an informed decision. You should receive an email within the next couple weeks.

Kind regards  
*Name of AVP*

### **2) Email Wording from Helen to Managers - For information**

Title – Invitation to take part in *Company Name* Research  
Dear

I am writing to you to invite you to take part in an interesting research study, focusing on General Managers in the hotel industry. You should have received an email earlier from *name of AVP*. My area of interest is Strategic Implementation and Control.

The research focuses on hotel General Managers because they have a key “strategic role”, mediating and managing day-to-day the challenge of strategic implementation, making a link between strategy and operation. Whilst dealing with a multitude of different people, including customers, owners, departmental heads and financial controllers, regional and head Office managers, you have to manage the tensions between various agendas and priorities within a strategic control context.

If you are interested in getting involved, please reply to this email, I will then send you more information about the study and your contribution to it.

Thank you for reading this email and I look forward to hearing from you in due course.

Kind regards  
Helen

## Appendix 2 – Participant information sheets and consent forms

### 1) Research Briefing for Managers

\*  
University of Brighton

#### Research Briefing for Managers supplement to Ethics Info Sheet

##### Focus of Research

Who? - Hotel General Managers have key “strategic role”, mediating and managing day-to-day in an international hotel company. Dealing with multitude of different people, including Customers, Owners, Departmental Heads and Financial Controllers, Regional and Head Office managers. Mediating the tensions between various agendas and priorities within a strategic context.

What? – This research will focus on the monthly review process including the build up to and the experience of the monthly meetings and conference calls.

Why? – My research aims to reveal the routine and non-routine decision making of managers and the tacit knowledge and experience associated with the role of General Manager. To understand the role of middle managers in the day to day implementation of strategy.

Day to day practice of control – You will be asked to describe and evaluate the actions and decisions you take to control the operation of your unit as you prepare for the monthly review meetings. For example prioritisation decisions, allocation of resources, adapting to unexpected events and dealing with problems that arise.

I am interested in a few themes, which I would ask you to keep these in mind during the research.:-

- 1) the level of autonomy and discretion you have in particular circumstances;
- 2) the role of organisational culture and institutionalisation (put more simply “the way things are done round here”) and
- 3) your relationships with the hotel team and Head Office and Regional Staff.

Following an initial interview and briefing session, you will be asked to maintain a record of your experiences, called a reflective log or diary, relating to the weekly review and control meetings you are involved in, building up to, and including, the monthly review meeting. A follow-up interview may also be requested. It is expected that you will benefit from being involved in this research, as the process of reflection encourages learning and self-development.

For each reflective log/diary entry (approx. 10mins) please record the following:-

- 1) Date and time of meeting/discussions, who was in attendance/involved.
- 2) The purpose and the context, or background, to meeting or conversation.
- 3) What was discussed, what decisions were made, what were the outcomes?
- 4) What was the atmosphere and the tone of interactions; did it match your expectations?
- 5) Why do you think it went this way? To what extent did you draw upon your values and previous experience? Please provide details.
- 6) In reflection, would you have done anything differently and if so why?

##### Data collection

I will supply you with a Dictaphone to allow you to easily and quickly record your diary as an audio (MP3) file and ask you to upload your recordings weekly to a secure and confidential Dropbox folder. Only you and I will have access to your recordings. I will check in with you on a regular basis throughout the period of the research.

*Thank you for your contribution and commitment to this research.  
Regards, Helen Atkinson*

## 2) Participant Information sheet part 1

|   |  |
|---|--|
| <br><b>University of Brighton</b>  |  |
| <b>Research Ethics Participant Information Sheet</b>  |  |
| <p><u>Title of the study</u> - Mediating Control: the role of middle managers in the practice of strategic control in an international hotel organization.</p>  |  |
| <p><u>Purpose of study</u> - To explore the practice of control and the role, and experiences, of middle managers, in the operation and development of management control systems.</p>  |  |
| <p><u>Research Process:</u></p>   |  |
| <ul style="list-style-type: none"> <li>▪ You have been selected because you have direct experience of working within the organisation's strategic control systems.</li> <li>▪ You will be asked to engage in an interview and maintain a reflective log over a limited period of time, relating your personal experiences of working within the organisational environment of this international hotel group.</li> <li>▪ Interviews will normally last between 45 minutes and 1 hour 15 mins. Reflective logs will be maintained over a two month period with approximately 1 – 3 entries a week.</li> <li>▪ You will benefit from reflecting on your own experience and learning more about the research project through discussions during the interviews. No discomfort or inconvenience is expected for you and there are no risks to you from being involved.</li> <li>▪ Your privacy will be maintained, statements made in the interview will be attributed to a pseudonym or code name, so as to maintain individual anonymity. All transcripts of interviews will be stored securely and password protected. (This project and the research methods employed are in accordance with the University of Brighton regulations and have been approved by University Research Ethics Committee).</li> <li>▪ The results of the research will be written up and disseminated following analysis with anonymity maintained for you and the organization.</li> <li>▪ You may refuse to participate in the research, or withdraw from the research project, at any time, for any reason.</li> <li>▪ If you have any concerns about the conduct of the research project, you can contact Dr Ann Mandy, Director of Postgraduate Studies, Eastbourne Doctoral College, University of Brighton, Aldro Building, Darley Road, Eastbourne BN20 7UR . Email <a href="mailto:A.Mandy@brighton.ac.uk">A.Mandy@brighton.ac.uk</a> or telephone 01273 643946 .</li> </ul> |  |
| <p>Principal Researcher: Mrs Helen Atkinson<br/>         University of Brighton<br/>         School of Service Management<br/>         Darley Road, Eastbourne,<br/>         East Sussex. BN21 7UR<br/>         Tele: 01273 643667<br/>         Email: <a href="mailto:hca@bton.ac.uk">hca@bton.ac.uk</a></p>   | <p>Director of Studies: Dr Paul Frost<br/>         Campus Director<br/>         University of Brighton - Hastings<br/>         Priory Square Building<br/>         Priory Square<br/>         Hastings. TN34 1EA<br/>         Tele: 01273 6434601<br/>         Email: <a href="mailto:P.E.Frost@brighton.ac.uk">P.E.Frost@brighton.ac.uk</a></p> |

### 3) Participant Information Part 2 - Consent form

|  |  |  |
|--|--|--|
|  |  | <br><b>University of Brighton</b> |
| <b>CONSENT FORM</b>  |  |  |
| <b>Full title of Project:</b> Mediating Control: the role of middle managers in the practice of strategic control in an international hotel organization.  |  |  |
| <b>Name, position and contact address of Researcher:</b> Helen Atkinson, Principal Lecturer, School of Service Management, University of Brighton Darley Road Eastbourne East Sussex BN21 7UR  |  |  |
|  |  | <b>Please initial box</b>  |
| 1.   | I confirm that I have read and understand the information sheet for the above study and have had the opportunity to ask questions. | <input type="checkbox"/>   |
| 2.   | I understand that my participation is voluntary and that I am free to withdraw at any time, without giving reason.                 | <input type="checkbox"/>   |
| 3.   | I agree to take part in the above study.   | <input type="checkbox"/>   |
|  |  | <b>Please tick box</b>   |
|  |  | <b>Yes      No</b>   |
| 4.   | I agree to the use of audio recording  | <input type="checkbox"/> <input type="checkbox"/>  |
| 5.   | I agree to the use of anonymised quotes in publications  | <input type="checkbox"/> <input type="checkbox"/>  |
| <p>If you have any concerns about the conduct of the research project, you can contact Dr Ann Mandy, Director of Post Graduate Studies, Eastbourne Doctoral College, University of Brighton, Aldro Building, Darley Road, Eastbourne BN20 7UR . Email <a href="mailto:A.Mandy@brighton.ac.uk">A.Mandy@brighton.ac.uk</a> or telephone 01273 643946 .</p> |  |  |
| Name of Participant  | Date   | Signature  |
| _____  | _____  | _____  |
| Name of Researcher   | Date   | Signature  |
| Helen Atkinson   | _____  | _____  |

### **Appendix 3 - Extract from Annotated transcript**

This appendix contains extracts from one of the GM interview transcripts showing the research notes and annotations and the use of colour coding as described in chapter 4. This extract includes pages 17 - 36 printed two pages per page.

Helen How would you describe it?

Graham Well I think from where you look at the very basics in terms of the 4D strategy, as how that is implemented. From a service culture in terms of 'delighting guests' you have the [redacted] culture ... which is so ... I mean it just gives you the licence to be the hotel person that you want to be - to be that hotelier of [redacted] [25.35]

There is no rhyme or reason why we should say no to someone. And that makes it so much easier.

Because where I came from, in terms of Disney, it was all about the guests: everything was about the guests. And it allows us the opportunity to do that and to build that culture in.

But then also from the colleague point of view, it is that everybody will chip in. It is all about:

"Yes I can help you do that"

"Yes we can do it and we can work through it and we will get there"

[26.00]

And then from [redacted] that has come up, the 'Women in Leadership' all of those sorts of investments in terms of developing people and the culture. It is very difficult to describe it, but you can see that it is fully encompassed. [26.19]

Helen Yes I saw it on the U-Tube.

Graham Yes

Helen And obviously you had [redacted] and I have forgotten his first name) [redacted]

Graham [redacted]

Helen [redacted] and he came from Hilton didn't he?

Graham yes And I think from that point, you can very much see a lot of the good of Hilton coming to ... you can see that massive ... err ... where Hilton it was obviously hierarchally one of the leaders essentially I guess. [26.53]

And you can see a lot of the infrastructure coming now, as to what was there. You can see the cultural bits - but it is merely as a complementary part to what already existed and the solid foundation that was there. [27.04]

Helen It is what we often talk about (and you know this) we talk about maybe Hilton and Marriott are the cookie cutters, do you know what I mean?

Graham Yep, yep.

Helen And therefore ... [redacted] isn't a cookie cutter, and I wonder whether it is being, you know, turned into a cookie cutter or whether they are not? [27.19]

Graham And I can see ... you can see in the strategy that this is becoming ... and we are now coming to the fore in terms of what we are doing and the message that is getting out there.

And you can really see that ... we are really reaching to be on a par with this now. And we are getting everything to be where it is supposed to be, on a global scale.

And that amalgamation between [redacted] now, has been fundamental in that. [27.44]

And where you can see ... and that can only ever become bigger as this strategic alignment moves forward.

Helen Yes, Just going back to the culture, and you know, you were talking about the [redacted]

Graham Yes

Helen But can you tell me how that manifests itself? How ... you know, how do you get a grasp on it? Could you give ... is it through examples ... through ... you know, you have done the theory of culture?

Graham Yes

Helen Artefacts - images - symbols. [28.15]

Graham Yes

Helen But it is also about other things.

Graham I think in terms of simple behaviour aspects. If you look at the ... in terms of the service culture [redacted] service culture) you look at ... a lot of it is to do with culture in terms of behavioural and how that manifests itself. [28.36]

So, if you look at the ... even from the engagement of team members, to the engagement of team members with guests, the engagement of team members with each other, the engagement of team members with social activities, with buying into things that you are trying to do. And you can really see that come through.

How you measure it, I guess, would be in terms of guest feedback - in terms of climate analysis - for team surveys.

Hospitable

Cultural norms

Corporate way of doing things

Difficult to describe

MAVD PRR

Hilton influence change

pull

Systems

not OK

coll. expectations culture behaviour

PRR expectations

Culture as strategy

Culture

leaders

But how we as a company then deliver the promises that are put up there from tangible artefacts of the literature that is coming out, the posters, the content of web materials, the delivery of trainings and the development of that - is really where that is coming from, I guess. [29.28]

artifacts

However, what I fundamentally believe and personally for me, is that culture can exist in an organisation, in a unit. It cannot if it is not led correctly. [29.42]

ethos leadership impact

And you know you can see it very apparently where you would go into a business unit and the ... that is not embraced from top down. And it does become very apparent very quickly. [29.58]

And I can see that historically in the same... pause... in both properties I guess, where I worked within the company before: it was that the ... the 'almighty buck' was more important than the guest.

what matters motive

Helen The...?

Graham Money was more important than the guest. [30.23]

Values Guest matters

Whereas that is really flip-sided in terms of ... well actually it is the guest that is giving you the money so who is more ... it is a chicken-and-egg thing. [30.29]

Helen Yes

Graham And not to speak ill of the previous administration, because I never worked with them and I don't understand where it went.

But like I ... whenever I went into, particularly a [redacted] which is all about vibrancy and it is all about colour and bringing fun and vibrancy to life. I found the property dead. There was no life within it. [30.51]

what mattered in Park Inn

And it was all about it - well you have the 4 [redacted] positive, fun, vibrant and [redacted] - everything we did was uncomplicated, nothing was vibrant, nothing was fun. And at the end of the day it wasn't a very positive working environment. [31.12]

Culture vs practice

Helen And that was [redacted] pillars?

Graham Yes

Helen Which was different obviously to [redacted] u's?

obviously yes

Graham Yes. And then you know ... and then having gone into Manchester, whereby they were going through refurbishment. An airport property is very different because it is in-out-in-out-in-out. And it is a very difficult environment to work in. [31.32]

day to day exp Practice

But still the element of that culture of... well these guests are here for 24 hours or even less, at the start of their holiday - the end of their holiday. You need to make this a culture of 'you are welcome'!

insite priorities at Manchester airport

Helen You have got even less time.

challenges

Graham You have got even less time to make an impact so you have to make that impact last.

airport hotel

Helen Yes

Graham And I think from that I can see historically ... I guess I say on my CV, what is it:

ethos enthusiasm

"I work with contagious enthusiasm" [32.04]

So if there is something that I am hugely enthusiastic about (or similarly not so much) that enthusiasm, if I do put it into it, it sort of does come to life.

And that is what I like to instil in people. Is that you give a directive of something that they need to do and ... (grimace) and you are not really quite sure that will work, but that is for me to kind of battle through in my own head. [32.33]

pragmatic make it work

But ultimately it is a directive, so let's make it work. Let's see how we can communicate that out and let's see in what way we can channel it so that it will become... [32.40]

Helen Yes. Can you think of an example of that? Because that is actually what I am looking for - it is that shock absorber, if you know what I mean?

Graham Yes Err... let me think... So, for example we are about to roll out 'Yes I Can' now again. So we went through [redacted] Relaunch'

Helen Had it changed?

Graham Yeah, they changed the whole program. So it previously was a 4 hour training session. And now it has gone to a full day. I haven't seen the content of it, although I have heard that it's phenomenal now. [33.10]

what matters about service being

Now from my part, I think that is so important, to get that foundation in at the start. And this will be something that is to new hire orientation. However part of the directive from the company is that you would have to do it for everybody.

So, if you have worked for the company for 25 years or you have worked for the company for 6 months, we will all go through this again. [33.28]

And so this communication is being messaged out and I have HODs that have worked here for 6 years and have worked for the company for ... (sigh) and.. (sighing) you now one of these and ... "Oh this is just ... (sigh)"

PPR

But it is ... and like through conversation and ok... "What is the resistance?" "What is the thought process towards this?"

concrete boiling challenges

[the replies] "It is a waste of my time" "I understand this" "La-la-la I get it!"

"I know what this is about I don't need to do this again" [33.56]

I say: "However what is the most important of this is that if this is our culture,... what if you think about it, how much of actually exists in what you now do on a day-to-day basis?" "Could you quantify that for me?" And it is like...

what is culture

Helen So ask the manager to articulate it?

Graham Yeah, yeah, yeah, and it is like: "Well I help people and I do this-that-and-the-other"

And it is like: Yes ok, but whereby somebody says to you something and you would maybe have given the feedback in a certain occasion 'well it is not my job get somebody else to do it' or 'I have shown you before why should I have to show you again'

You know [questioning tone] is that really the culture? [34.41]

P-P MEXP

And so if you and then in order to demonstrate what it is, where I do the ... in the , whenever I took over and I identified that there was an issue with that, I actually sent the entire hotel through again.

power P-P

And immediately the guest satisfaction scores ... you could literally plot it on a graph. You could see from exactly when it happened to the Climate Analysis scores year-on-year, to just the general atmosphere around the building. [35.12]

learning

It just (clicking fingers) instantly happened.

And then whenever you give a demonstrative example you can question it and it is exactly - ok I understand your concerns for 8 hours, if you then get this mind-set back in where it is not all about the computer work that you have to do and all of those sorts of things: how much impact does that have on you as a person? [35.34]

To put that forward into your theme and to inject that enthusiasm: How much more productivity will you get out of them? How much more enthusiasm and buy-in will you get?

✓

sew

And now we are actually at a stage whereby we are all a little bit excited about it now. And they have bought into what it is about. So, yes... [35.49]

outcome

Helen And that is here? That is here yes?

Graham That is here.

Helen So that is a really good example. And just going back to the strategy, what are the key strategy initiatives that you think. And you said it had changed a lot?

Graham Yes

Helen I wonder if you can just explain a bit more?

Graham So which I think encompasses everything - so

Helen Yes I am familiar with it.

Graham So [36.12]

strategy

And we are just working on t y for the hotel for this year. And re-jigging what it was into various (unclear).

Helen How long has en in place?

draw on 40

Graham Launched last year: so one full year we have come through it.

We learned a lot from it as to what is 'woolly' versus what is 'tangible' versus what is 'measurable'. [36.39]

And you can actually go through what you... What is the long-term goal? How is that broken down? How are you going to do it? Who is responsible for it? What support does that need in terms of resources, people and physical things? What money needs to be allocated to it? and then ultimately What is the measurable result that comes from it?

Setting Unit Strategy Power P-P capabilities

So it's ... where it is something that is a cultural ... err ... strategic in terms of business results - yes everything.

strategy

I put whole hotel through

But it really is a culture of:  
"This is how we are actually going to do something"  
"This is specifically a strategy building in the culture of the business."  
[37.25]

*Culture  
Integrated  
M&A Strategy*

But then breaking it down into finite detail as to:  
What is needed? How we are going to do...?  
What benefits are we going to get from it – individually/business/guest?  
... and all of those sorts of things. [38.37]

*Innovative*

Helen It is interesting: when I looked at it I noticed that the financial part, you know the drive results, was far more detailed in its articulation on the web site (because I am looking at public domain information).

Graham Absolutely of course.

Helen So on the others you might have 3 or 4 points: but on that one you had 3 sections with 4 points in each.

Graham Yes ... whereas...

Helen does that ... mean that that is more important? How does that work in terms of prioritisation and influence? [38.04]

Graham I guess as ... in a publically listed company, you are always going to have a lot more concentration put on the financial because that is what ultimately what the share-holder is looking for.

*power  
what matters*

So this is what you are going to get – this is how we are going to get it ... dah-dah-dah.

Helen Is that for the outside world? Or is it for the inside world too?

Graham Ummm...  
No – no – no – no – no.  
So I guess if you are looking public domain a lot of people are interested in the financials.

*P-P-R  
note  
M&A*

And then whenever you come into the internal organisation, everything else exists into ... because without the people and without the profiling and without all of that aspects of things, you don't necessarily see ... you are never going to achieve all of this, because the computer can only do so much. [38.46]

A trend analysis computer program can only do so many things. You are dealing with people guest-wise and team-wise so if you don't have the right people to do that then people just won't come back and people won't come and work for you. [39.00]

*Ethos  
People  
Guests  
Team*

And now you will see whereby the financial domain is being ... all of this is on the public domain you will now find that there is a lot of stuff coming out from our organisation in terms of the people side, so:

*What  
matter  
in situ  
norms*

What are we doing in terms of developing talent?

What are we doing in terms of ... ip – in terms of ...

...and you will see on U-Tube those sorts of things.

Helen Yes

Graham And attracting people to come and work for us.

*external comes  
target audiences*

Attracting guests to come and stay with us.

To then ultimately reach what this financial result is. [39.35]

So there has to be I guess, in terms of delivering the message, well who is the message actually going to?

So if you are saying it is a publically listed company, the financial message needs to go to those people.

But then, if you are looking at it from a ... from a potential employee point of view, you would look up very different things on the internet, or in the public domain, as to what is the culture of ... all through U-Tube or through This... this is what it is about.

*Culture  
comes*

As a guest to ... what is this about?

So it is very much dependent on what you look for. [40.12]

And that is where we are really channelling out that information now, and it is all coming at the same time.

Helen As a GM what do you prioritise?

Graham Umm...?

Helen You know, when you are having perhaps conversations with your Regional Managers?

Graham Yep

Helen Or if you are having your review – you know, your regular reviews?

Graham Mmm

Helen What are the conversations about and what are the things that you prioritise or do they change over time?

Graham They evolve.

Ultimately you are fully responsible for the P&L of the hotel, so the financial result is ultimately the most important result. To say that this is what we are delivering: bottom line, cash value, etc., [40.49]

position expectations role expectations

Helen Yes

Graham But within that ... like you talked about a (smiling) swan going across a lake ... and paddling underneath because there are so many other things going on.

metaphor

But there really is so much going on! [41.00]

And as a GM ultimately whereby you ... I have 8 direct reports and an agency housekeeper. Getting those aligned as to each one of those areas has their priorities but it is all fitting into what you are going to do short-term versus the long-term goal, versus the...

GM role R-P resource allocation

Correct behavior Miro memo notes

And then you also have ... well what is it that you have UK and Ireland strategy, and how does that fit into the global strategy.

strategy

And then filter it right the way through the whole thing. And there is a red line.

And there is a line of sight that is going from everything up... [41.41]

Naturally as a person, you will have your own little nuances or things that are important to you. So for me, ultimately my ... realistically in a cultural aspect or leading this organisation, is the people and the guest. [41.59]

Also cultural people guest

Because I don't believe that without the right people, that you will have those guests.

✓

Helen And they drive the results.

focus on people to deliver results

Graham Correct. And you know, it is all (unclear) simply so what are we doing to look after the people?

And that takes in a whole number of things in terms of ... I can't expect you as a team member to do a job if I don't provide you with the right equipment or the right ... err ... physical resource in order to do that.

business Budget

So as a manager I expect you to service 250 rooms on a day, if I don't give you the right number of people and the right payroll budget to do that, then ultimately I am setting you up for a fail and myself up for a fail to start with. [42.34]

So, realistically (and I am sorry to answer your question I digressed slightly) but...

Helen That is fine

Graham So ... as the GM you are responsible for the P&L of the hotel, so that frankly where you are. But the P&L of the hotel takes in everything.

Role responsibility accountable for P&L

Helen Yes

responsible PP

Graham From costs to guests and to...

If you look ... I don't know if you have visibility of our month-end reports, but it takes in your financial results, to your guest satisfaction results to health and safety scores, climate analysis results, seals activities - it really builds in everything. [43.11]

facets of performance Role responsibility

And on a day-to-day basis your time is taken with how you plan your time, to give enough time to each one of those people, to understand what they are doing, how they are doing it.

day

Are they being effective?

Do they need direction, guidance or leadership in order to be more effective in what they are doing? [43.36]

(Etho) guidance soft

Helen

That is really interesting, because that naturally brings me to the third element.

Graham Ok

Helen Although I want to go back to strategy - one more of it - but while we are on control that sort of brings us naturally to control, and the control systems that you talked about.

outcome

Graham Sure, ok

Helen You know, the Health and Safety audit, the guest satisfaction, the climate analysis ... they are all measures of performance in different dimensions aren't they.

✓

Graham Sure, mmm

Helen I suppose ... and we have also addressed then, that other question from me, which is 'what matters around here?' [44.00]

Graham Mmm

✓

Helen And as you say, ultimately it is the financial performance but that is driven by performance in these other elements.

Graham Yes

Helen And that is actually... so I suppose my question would be where do you take action? Where do you take action to control the operations of this unit?

need to find eg. of SCD in internal controls

Graham Err ... well ... umm... (pause)

Literally everywhere [44.25]

Now I don't consider myself to be a control freak or such. But you do have ... but there is a certain element whereby the GM role is very strategic.

Responsibilities

Personal exec not control freak

no role

However, if you aren't in control of what is happening, ... this is where you want to get to, but if you don't have control of what is happening day-to-day, then you are never going to get there. And also you are probably end up going in the reverse direction. [44.48]

So, those sorts of control mechanisms are how I would plan out my day, day-to-day, week-to-week and month-to-month.

So essentially, on a daily basis, you would have things like your morning meetings, your revenue calls, your ... then sort of daily...

So:

Morning meeting

Revenue Call

My own personal activities in terms of what reports I look at - Medallia, TripAdvisor app. and those sorts of things. Because they only take 2 minutes and you can gauge where you are with what is going on. [45.24]

Through to weekly activities, so that would be: Weekly operations meetings, Weekly payroll, Weekly catch up with each one of the direct reports

Through to monthly meetings and month-end reports: HOD meetings Strategy meeting Revenue.. umm..

...so there is really a structure in what you are doing. [45.53]

ordering of concern! Use it to monitor manage

role/tasks

price / set rates

day 2 day activity

(V)

Helen Yes so you have got a structured series of operational verses strategic meetings.

Graham Yeah

Helen But in terms of the actions you take...? Well they will be revealed I think, when you start to take some recordings and you reflect on these regular things you do - because it is that day-to-day action. [46.07]

Graham Yes

Helen I think I would just like to take you back to strategy. In terms of strategic initiatives and one of the things that I am aware of is there has been a

series of changes in terms of Cluster HR and Cluster Revenue and Centralisation of Revenue at Heathrow.

And without sort of trying to lead you into things (that is trying to give you examples) what strategic initiatives have you been aware of and how have they worked for you?

Graham Ok. This one is a bit unusual for me because I am quite relatively young into this role - however, there is an element of Human Resource. So I share my HR manager with 3 other properties. [46.44]

(V)

Helen Here in Cardiff?

Graham 2 in Cardiff and 1 in Bristol

So in that ... that poses ... that has its benefits and it also poses its challenges, both in terms of what I would like to achieve and then ultimately in terms of what the actual HR manager would like to achieve, because her time is split. [47.07]

+ we attitude N.B. resemblance to put the first!!

But that ... that ultimately leads to the need for very clear and ... 'diarized' times of working on occasion, as to ... catching up. This is where we are and this is what is going on.

sd way exact due to digital

So that leads you to how you manage that situation - is very different to leading somebody that is in ... in the business day-in-day-out. [47.31]

Helen So direct report ... sole report to you.

Graham Yes

Helen Yes

Graham Yeah ... umm ... each one in itself poses both benefits and challenges. [47.40]

PPA

So, looking at the revenue functionality within the hotel, there can be quite a few relationship challenges between the in-house revenue function and the cluster revenue function.

significance meaning about PP relations

Solely because there is a lack of understanding as to what is trying to be achieved, because one is not reporting to me directly and one is. So whereby you have the ... and I as GM don't necessarily have visibility of what they are targeted on. [48.17]

(V)

Helen What, the cluster?

initiative of power level

Graham Yes.

They don't necessarily have visibility of what we are trying to achieve at the property level, and how each one of the people move together. [48.26]

Complex relationship

dialectic relationship

So, that is quite an interesting dynamic to have

and you know, since I have been here I have taken steps in order to be able to address those situations and to break down those barriers. [48.38]

*Ash to improve*

Helen Can you give me a couple of examples of little moments as it were. You are obviously reflecting on that circumstance?

Graham Sure

Helen What were the little moments that brought you to that evaluation of it?

*disagreement*

Graham Ok - so we are going through a revenue call and we have a fundamental disagreement as to what the rate should be for a 'rugby day' let's say, for example. [48.55]

*PRR*

Helen Yes

Graham So the Cluster Revenue person, who has limited knowledge of the market and what is happening, versus a very ... err ... long established person, who has great understanding of the local market and what goes on, etc., etc., So ultimately you have two people, and this one is driven to 'grow rate' and this one is driven 'total revenue' and so ... it is being able to have that conversation and influence both people while on the telephone ... and trying for there not to be an argument. [49.35]

*Integrative Solution Meaning Mediation*

*Help support objectives, don't help conflict // Structurally setup*

And you know, in that situation it is being able to understand that. And so that was one thing that jumped up. So just those examples.

Whenever you come to the stage of dealing with a revenue call: so you are doing a revenue meeting, historically there will be 3 or 4 people around looking at a PowerPoint.

And now you are dealing with somebody at the end of the phone dealing with a Web Conference ... and let's say something funny happens to happen in the office. And then there is a little bit of a giggle in the office and then the other person on the phone are alienated from that situation and they don't really understand the personalities because they don't know the people and understand how we interact.

*Behos empathy send think reflexively*

And then it all of a sudden goes very quiet at the other end of the ... 'are they talking about something that I just said?' whereas somebody just dropped the coffee over them and it was kind of one of those silly situations.

Helen It is not video and they can't see

Graham No. And you do have to be very careful about your behaviour and how you do that. [50.34]

*Time/space dynamics*

But, from an educational point of view, that may have been something that was never thought about before.

So when I came here it was like ... so you know... and at the end of the conversation it was like ... then somebody would have mentioned that the person had gone very quiet at the other end of the phone.

And I said: "Well why do you think that was?" [50.55]

Helen So you reflect with your team afterwards.

Graham Yeah, yeah, yeah And then ultimately the behavioural pattern going through...

*emo*

So now, let's say for example, you spill a cup of coffee over you, and we erupt in laughter (after making sure of course that you are ok)... (laughter) ...But it is to make sure that what is happening in the room is communicated to that... you know, so that ... ultimately then it is like: "We are laughing because..."

*causing*

And not ... not because you have just told us that the rate for next week needs to be whatever it needs to be. [51.25]

*(V)*

Helen It is not that you 'can't be serious' laugh but "somebody has dropped a coffee!" laugh..

Graham Yes, do you know what I mean? and it is that sort of behaviour on a relationship point of view.

Helen And do the revenue ... do the Cluster people manage to come and visit you? Is there any way that they can help develop that relationship?

Graham Absolutely. So since I started here we have had ... I invited the Cluster Revenue Manager down as an initial introduction so that I could meet her - and she had to do her site visit.

*Notes -> referring*

But, more importantly what I wanted to do was involve ... because what I wanted to do from a revenue functionally, rather than simply look at rooms revenue and meetings and events revenue, is look at the total revenue of the hotel.

And so ... and where I talk about how I have been developed in my past, as Front Office Manager, I was involved in revenue calls. And as a F&D manager I was involved in revenue aspect of that.

*past - experience*

So my plan is that yes, we will have the weekly revenue meeting, primarily based around rooms because essentially it is the fundamental part of the business. [52.18]

(N) Helen Does the central cluster influence room rate? Or do they also influence meeting and events rates?

Graham They have support: it is a support functionality for M&E and looking at that revenue that is there, but that is very much about... [52.30] PPR

(J) Helen ...fundamentally about room rate?

Graham Yes. And ... room rate or occupancy. PPR - Cluster Revenue advice on rooms

Helen Yes

Graham Depending which strategy you are on.

Helen Yes

Graham But ultimately then, in order to develop my Front Office Manager and my Food and Beverage Manager, every once a month then we would have a total revenue meeting if that makes sense. [52.49]

Helen Yes absolutely.

Graham And so therefore in order to be able to do that now I am going to introduce another 4 people into the meeting with this person who has no visibility of who they are and how they behave and what they do.

So I actually invited Joanne down then for the HOD meeting. [53.04] PPR - invite Cluster with visit new team

Helen Because all the theory tells us that the revenue Managers are moving from revenue management to total revenue management.

Graham Yes.

Helen ...and now moving to GOPPAR: total operating profit.

Graham Yep. Yep. Yeah absolutely...

Helen Because actually the people who you choose to put in the rooms ... the rate isn't always based either for profit or for revenue.

Graham (agreeing) No, no, no. Are you going to spend any money in my outlets? And what is that going to do? And how is that commissioned? ...and all those sorts of things.

Helen It is an emerging and developing area all the time.

Graham Yes

Helen Practically presumably and... So that centralisation of the revenue function you see draw-backs from it. Do you see benefits from it?

Graham Oh absolutely – don't get me wrong. It is absolutely not a negative thing.

It does bring a lot of objectivity to the situation whereby you have somebody completely removed from the environment. So, whereby you ... you sometimes do become very emotional about: "Well I am not selling my property for that!" [53.49]

Helen Yes. I can't believe you want to put rates down! Up-up-up with the rate (unclear chatter and laughter)

Graham And you know, should we be on a rate strategy for this month? Should we be on an occupancy strategy for that? What are we doing for this? [54.04] Strategy rate or occ

Helen And then obviously you have a lot of people in terms of data .. data analytics and research and stuff like that where you can...

So I can turn around and go: "Well tell me in 2012...?"

We had this situation in May whereby we were ... May wasn't looking to be a great month and there was a sleepless night or two that was had. But you know, you were able to ask the question, because we had the Heineken Cup last year, but we didn't have it the year before, so you are actually going back historically. "What is the pickup?" "Where did that come from?" "Who booked?" "When did they book?" "What was the lead time and what was the pace?" ...and all of that sort of stuff. [54.42]

(V) Helen So you can demand that sort of analysis from Heathrow?

Graham Yes, I can go to my Revenue or my Reservations Manager here – but she is dealing with the rest of all that. Whereas now I have that support function to go...

(V) Helen So "we really want to understand this, give us some details"

Graham Yes And they will come back to you. And they take an awful lot of stuff away which is...

Helen So there is HR and there is Revenue: have there been other changes on other functions? Or are they the main ones?

Graham Primarily those are the main ones. [55.09] Finance is ... hasn't affected us, but it has with the Park Inn properties, so I don't have full visibility of what that actually was.

Helen You have your own FC?

Graham Yes, yes - I have my own FC and 2 account assistants. [55.23] PPR  
And then COs ultimately will be the next one to come along as to how that is going to work, but that is...

Helen I do know when I was here, a long time ago, talking about the changes in finance: those changes were made a long time ago.

Graham Yep, I know

Helen In terms of ... again centralising more expertise and reducing the seniority of the decision making on the financial front in the units. [55.44]

Graham Mmm  
Yep  
You can look at it and say, you know as a GM I can go ... well my Revenue Manager sits there and reports to RevGen and my HR is over there an reports to the regional HR, and this and that and the other.

But ultimately yes ok so ... and I can understand from ... you know if I look at the more established GMs let's say, whereby "You are talking all of this away from me." Well ultimately from my part, I can look at it and go..."well..."

But you are still very much involved in the decision making process. You very much have your own strategy for what this hotel is going to be and what your vision for this hotel is going to be.

Helen Yes

Graham But that ultimately test you in your leadership skills, because you need to influence people in order to get them on to your side. [56.30]

So rather than: (banging the table) "I want! I am the GM! I will have!" ... well ok yes, there are sometimes yes, whenever that does need to happen, but ... but realistically if you want people to come along on the journey with you... but more importantly bring their ideas... because I can't sit here and come up with all the weird and wonderful and whacky ideas.

Helen But ultimately the buck stops with you. [56.51]

Graham Yeah, yeah, yeah.

Helen So ultimately you might have a more consultative style or a team style rather than an autocratic style, but ultimately the buck stops with you? [57.03]

Graham Yes. absolutely  
So there is that, you know, consultative ... absolutely but if we get to the stage whereby we are all going round in circles and nobody is agreeing on anything, then ultimately that is my role to say: "Ok this is where we are going." "This is what we are doing." "This is what we are doing" "It is my decision" [57.17]

Helen Have you got an example where you have had to sort of say - right I have listened to everybody, and I have talked to you all and right - this is what I am going to decide?

Graham In terms of ...

Helen ...anything really....

Graham In terms of revenue ... revenue was really the main one that I have had to ... that sort of ... that sort of battle, for want of a better word. [57.35]

And realistically we were looking at revenues for one month since I have been here, the strategy was here and the strategy was going this way, and it was very much - ok... And I then agreed more to internally here as to what the plan was and whether it would have worked.

And that then ... you give a message to ... err ... this site who then reports to somewhere else, and so many people were involved in it.

But ultimately it is ... well I am responsible for here no. Yes, you have your month-end review on the property that you are doing this-that-and-the-other, but realistically I am ... you don't have to sit in front of Richard at the end of the month and say: "This is the performance for the hotel."

If I have made the decision, and I feel that it is the right decision, then it is going to be me at the end of the month that goes: "OK it didn't work and it is my fault." [58.30]

Helen And do you make those compromise decisions and perhaps those decisions to take advice or not take advice: do you make those overtly? Do you keep those quiet? Do you need to explain those? Or providing the results come through nobody asks any questions?

seals?

U

CRS - structures unit + region

PP + Δ attitude

P.P Your hotel

echo/ attitude for challenge of centralisation

echo/ Mgt style

PP power decisions

stake decision maker

PPR

PP budget see

echo/ accept responsibility

Graham Umm...? [58.44]

In terms of asking for information in order to come to the decision, I would be very overt.

I would be:

"Ok what are your thoughts?"

"If you were in this situation what would you do?"

...because I think that gets people to think. [58.58]

In my head, I have an idea as to where I am going to get to.

I wouldn't necessarily say I always have the decision made in my mind, but I would say:

"Ok well I think this is the way that I am going to go with this, but let me just sense check this around different people." [59.12]

Helen Yes

Graham So without giving that answer away, I will go:

"Ok well what are your thoughts on this?"

or

"If you were in this situation what would you do?"

...and then I would take that from...

So yes, I am very overt about ... so:

"Let's get involved in this."

"Give me an idea."

From a 'making the decision' whenever I have asked for the advice and I think it is only fair and only in the interests of transparency, to say:

"Well ok this is the decision that I have made and let me give you the reasons as to why I have done that" [59.38]

Whether you agree or disagree, then ultimately we can ... you are more than welcome at the end of it, to come back and go:

"I told you so"

But if you are going to do that to me, then if I have made the right decision then I am going to go back and say exactly the same to you.

Helen You don't get the "I told you so" around here, do you? Or do you?

Graham Well, in more of a ... in more of a ... not in a vindictive sort of way. But you know, you would get it in a ... (smiling)

"Well I told you so. I told you that wouldn't work".

Helen But you don't get it formally?

Graham Oh no: no, no, no, no, no... Oh no, no, no. [1.00.06]

agency?

PP - capabilities

Highly consultative

transparency

\* fun

MSL style fun

Categorical no to blame culture

(unambiguous & here)

Helen So if you did something, and it didn't work out, Richard wouldn't say "You shouldn't have done that"?

Graham Well no. [1.00.15]

And so let me lead you then into the ... in terms of the reporting to them and what they ... thankfully I have had a very good first couple of months here. The financial results speak for themselves.

The feedback that I have been given is that the impact that I have had has been a positive one. So that is great. [1.00.32]

When something goes wrong, touch-wood, I haven't really been exposed to that situation (laughing) and hopefully never will be.

But in terms of an organisation, and in terms of people I would like to think it that would be an understanding of well ... why did that happen?

And I guess I am also quite luckily in the stage that I have just come through the development process. So I am still learning myself. And I think that realistically there is that support mechanism to say why, what, and this that and the other.

I still remain of the new boy sort of stance to say ... well I would be quite cautious, so if I don't know the answer to a question or if I am hesitant, then again in ... in a very open and honest way I would be the first to lift the phone and go... [1.01.24]

Helen And who would you pick? [redacted] ?

Graham I would actually lift the phone. [redacted] would be my first port-of-call. He was my old GM and my mentor.

So because ... you do go through that aspect of, and again probably from a hypercritical point of view, I don't want to lift the phone and sound like an idiot to my boss! Does that make sense?

✓ Helen So you have got that informal network.

Graham Yes PPR

Helen And that is important to you and it is personal.

Graham Yes, you know I ... and again with that sort of learning ... and [redacted] would be one of those people that I certainly would never be where I am right now without him. And he will throw the question back at me. [1.01.58]

I will phone him and I know what he is going to say to me - he is going to go: "Well what is your answer?"

echo self-facing w/ pretensions

obvs ask to help

PPR advisor informal

PPR formal main face

PPR mentor