

MAKING THE NUMBERS: AGENCY IN COMPUTER-GENERATED FORMAL REPRESENTATIONS OF SALESWORK

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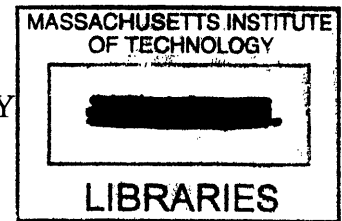
José João Marques de Oliveira Vieira da Cunha

Master, Instituto Superior de Psicologia Aplicada, Portugal, 1999
Licenciado, Universidade Católica Portuguesa, Portugal, 1997

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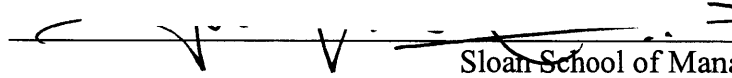


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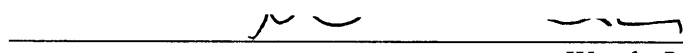
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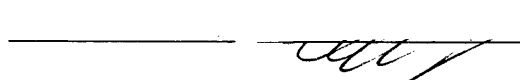
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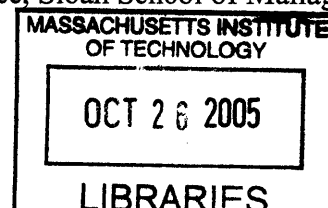
Certified by:


Wanda J. Orlikowski
Eaton Peabody Chair of Communication Sciences and
Professor of Information Technologies and Organization Studies
Thesis Supervisor

Accepted by:


Birger Wernerfelt
J.C. Penney Professor of Management
Chair of the PhD Committee, Sloan School of Management

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REPRESENTATIONS OF SALESWORK

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José João Marques de Oliveira Vieira da Cunha

Submitted to the Sloan School of Management
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ABSTRACT

This research builds on the literature on information technology and organizations to suggest an alternative to the current understanding of the production of computer-generated formal representations of work. This literature sees computer-generated formal representations of work as automatic outcomes of information technology that managers use to scrutinize employees. My ethnography of a desk-based sales unit suggests that managers have incentives to forfeit surveillance and instead apply their efforts to use information technology to build a façade of compliance with prescribed goals and prescribed rules, roles, and procedures. I show that such a façade requires continuous maintenance work and that it is employees, not managers, that have to engage in this work. Specifically, I show that employees need to engage in unprescribed work to earn the right to use formal information systems to represent work that they have not actually carried out. I explain how employees improvise a shadow information system to coordinate their unprescribed work across time. I also show how employees enact a set of personal and impersonal tactics to enlist the cooperation of other parts of their organization in their unprescribed work

I seek to shed light on the many hidden labors behind representations of compliance and place agency again in the center stage of the process of producing computer-generated formal representations of work. In doing so, I aim to contribute to the understanding of visibility of action in social theory by showing that it is possible to manage how visible one's action is, even when that action unfolds in a front stage.

Thesis Supervisor: Wanda J. Orlikowski

Title: Eaton Peabody Chair of Communication Sciences and Professor of Information
Technologies and Organization Studies

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Pardon me while I switch to Portuguese.

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I leave you with one of my favorite lines, "I don't know half of you half as well as I should like, and I like less than half of you half as well as you deserve" (Tolkien, 2002: 22). I really don't.

Time to go.

CHAPTER 1:
AN INTRODUCTION TO THE PROBLEM OF AGENCY IN FORMAL
REPRESENTATIONS OF WORK

"Morgoth held the Orcs in dire thralldom; for in their corruption they had lost almost all possibility of resisting the domination of his will. So great indeed did its pressure upon them become ere Angband fell that, if he turned his thought towards them, they were conscious of his 'eye' wherever they might be." (Tolkien, 1993)

How can employees engage in unprescribed work in informed organizations (cf. Zuboff, 1988)?

The dominant view in the literature on information technology and organizations argues that unprescribed work is jeopardized by managers' use of information technology for supervision (Garson, 1988; Zuboff, 1988). Many of the studies in this literature have documented how managers use information technology to increase their visibility over employees' action (e.g., Dandeker, 1990; Findlay & McKinlay, 2003; Sewell, 1998; Townsend, 2005; Webb & Palmer, 1998). In these studies, managers' use the information provided by management information systems to enforce prescribed goals, roles, rules and procedures and to discipline that do not comply with them. The emphasis is on control and compliance, not on allowing unprescribed work practices to emerge, no matter how helpful these practices are for the organization. Bentham's (1787/1995) panopticon is a frequently used metaphor in these studies to evoke a sense of ever-present supervision (Bain & Taylor, 2000; Winiecki, 2004; Zuboff, 1988). To be sure there is plenty of room for agency in the use of information technologies in

organizations. Employees are not mere subjects of technological progress. However, these studies suggest that employees are more inclined to reproduce managers' practices of surveillance, even if by resisting them, than enacting alternative practices of shared learning and collaboration (Coombs, Knights, & Willmott, 1992; Orlikowski, 1991; Sewell & Wilkinson, 1992).

Nonetheless, the literature on the use of information technology for prescribed collaborative work has shown that these technologies have the potential to be used to engage in unprescribed work more effectively. Research on computer-mediated work, especially in the context of virtual teams (see Schultze & Orlikowski, 2001 for a review), has shown that information technology can be used to share information widely and quickly. Orlikowski's (1996) study of the implementation of a work tracking system in a customer's service unit has shown that this type of system can be used to facilitate and disseminate learning. Jarvenpaa and Leidner (1999) have shown that information technology can also be used to facilitate the creation of a basis of trust that would otherwise require prolonged interaction. All of these possible uses of information technology have been shown to improve collaborative work on prescribed tasks. Therefore, if it were not for managers' use of information technology to engage in close supervision of their employees' actions, employees could use information technology in similar ways when engaging in unprescribed work and thus contribute to their organization's adaptability.

In this study, in which I present my analysis of my 15-month ethnography in a desk sales unit, I intend to show that managers' use of information technology for supervision is not incompatible with employees' use of information technology to engage in unprescribed work. Indeed, I want to show that managers have incentives to forfeit surveillance and instead apply

their efforts to use information technology to build a façade of compliance with prescribed goals and prescribed rules, roles, and procedures. But my message is not one of unbridled optimism. These façades require perpetual maintenance work and it is employees, not managers, who have to engage in this task. To this end, I put forth an ambitious research question. Ambitious because it questions the assumption of tight coupling between work and its representation, and instead takes the creation of formal representations of work as a labor in itself, quite separate from employees' everyday work.

How do employees produce formal representations of compliance without doing the work that such formal representations require? By answering this research question I seek to shed light on the many hidden labors behind representations of compliance, and place agency again in the center stage of the process through which work is formally represented in organizations. In doing so, I aim to contribute to the understanding of visibility of action in social theory. My ambition is to show that it is possible to manage how visible one's action is, even when that action unfolds in a place regionalized as a front stage.

These intentions were not the outcome of a careful and prolonged study of the literature on information technology and organizations from which I deduced a research problem and a research question. Instead both were the outcome of the emergent process through which I used my knowledge of the literature on IT and organizations to make sense of my experience at DeskSales as it unfolded. The next chapter, which makes the case for my study's value, should thus be read as a post-facto justification, not as a pre-existing intention. What did precede my joining DeskSales was my commitment to ethnography as a research method. When I look at the world I see agents enacting strings of practices building upon each other, constraining each other, enabling each other. I see structures as having a virtual existence and being only instantiated in

these practices and I see practices as arrays of actions within a material context (Giddens, 1986; Greene, 1999; Schatzki, Knorr-Cetina, & Savigny, 2001). For those of such a disposition, only a close and prolonged contact with agents' practices gives some assurance of understanding. Any other method, qualitative or quantitative, seems too far removed and based on too abstract a notion of social phenomena to make sense. Therefore, the chapter on methods that follows the statement of this study's research problem and research question should be seen as an attempt to justify my enactment of my own position in the field of science, not as a logical deductive process that takes method to follow a research question. That is a dangerous model that, in my observation, is only empirically valid for the choice of particular variations of techniques within an espoused method.

The three chapters that follow make three empirical cuts at the data that ground my study. In my first data chapter, I articulate the first-line managers' dilemma. I posit that first-line managers are subjected to two opposite forces: the bureaucratic push and the improvisational pull. I suggest possible tactic to address this dilemma: the façade-creation strategy. In this strategy, first line managers limit their interpretation of both forces to create a representation of compliance with prescribed rules, roles, procedures and goals. First-line managers forfeit the supervision of their employees' everyday work and restrict themselves to enforce the creation of representations. This suggests that managers not only manage work down the hierarchy, but also representations up the organization. I further show that supervision based on formal representations of work facilitates the creation and maintenance of a façade of compliance in a way that direct supervision does not allow.

In the next two data chapters, I address the two consequences that the enactment of the façade creation strategy had for DeskSales employees. Desk Salespeople engaged in service

work so as to create a representation of compliance in Siebel. However they had no prescribed system to scaffold the coordination of their service work across time, nor did they have the prescribed ties they needed to enlist the cooperation of their company's service units in their service work.

In the first of these two chapters I create a model of the main tasks that employees engage in to coordinate their own work across time when the habitual prescribed scaffolds for this coordination – the production process and managerial orders – are not available. I show that for two of those tasks – keeping a record of outstanding work and keeping a record of the information related to that work – employees rely on an improvised information system. I show that the material basis of this improvised information system matters for managers. If it is difficult for managers to see their employees' work because of the materials used to improvise this information system, then managers will have little if any possibility to supervise and influence the progress of such work. I also show that the third task of temporal coordination – prioritizing outstanding tasks – is successfully delegated to agents outside the organization. I show that employees' work can be prioritized according to outsiders' interests, which can easily be at odds with the interests of the organization.

In the third data chapter, I present three alternatives to personal ties to engage in unprescribed cooperation in organizations. I show that unprescribed cooperation does not require enduring personal ties. Unprescribed cooperation can happen through spot personal ties with agents within and outside the organization's boundaries, and unprescribed cooperation can also happen through impersonal tactics, such as using forms to enlist the cooperation of other organizational units.

Before concluding the study with implications for theory and practice, I weave the three chapters that present my findings into an alternative approach to the role of agency in producing computer-generated formal representations of work and an alternative approach to the problem of managing the visibility of one's work.

To begin, I start with the justification of the research problem and research question that guided my study.

CHAPTER 2:
APPROACHES TO VISIBILITY AND THE PRODUCTION OF FORMAL
REPRESENTATIONS OF WORK

The challenges of showing and hiding work were the dominant themes in my interpretation of employees and managers' experience at Desk Sales – the sales unit where I conducted this study.

Managers spent most of their time at work supervising employees' creation of a formal representation of their work in Siebel (the information system adopted in their company), preparing reports based on that formal representation of their employees work, and presenting these reports to upper-level managers. Employees spent most of their time doing service work, but they often complained that they only did service work to be able to earn the right to report others' sales as their own. When not engaging in service work, employees spent their time creating a representation of compliance with sales and saleswork targets in Siebel. Making work visible in Siebel seemed to be the unit's main task.

DeskSales' employees, however, did very little, if any sales and saleswork. Most of the sales that employees reported in Siebel were done by other parts of their company's sales force. Most of the calls to customers reported on this system were never actually made. The representation of DeskSales employees' compliance with sales and saleswork targets in Siebel was thus a façade which required continuous effort to be sustained.

DeskSales' employees and their managers were successful in creating and sustaining such a façade. The unit and its managers were often rewarded with some of the most prestigious sales-performance awards in the company. This achievement suggests that my research at

DeskSales can contribute to the social study of practices and the study of information technology and organizations. The visibility of practices is one of the central problems in the social study of practices. Some of the most prominent authors in this literature (e.g., Giddens, 1986) argue that the visibility of agents' practices is agents' main resource to shape the practices of others. The dominant view on the visibility of practices suggests that agents use front stages and back stages to manage the extent to which others have access to their action. The use of front stages and back stages for this purpose has two limitations. The first is that, according to the dominant view on the visibility of practices, a space can only be a front stage or a back stage at any single point in time, not both. The second is that front stages and back stages are a joint accomplishment between agents and their audience. If a space is jointly defined as a front stage, then the audience will interpret agents' practices as a performance put on with a specific end in mind. Only if a space is jointly defined as a backstage will the audience interpret agents practices in that space (if the audience is granted access to those practices) as genuine – a window into the agents' behavior and thoughts. DeskSales' managers and employees were able to use Siebel, their formal information system, as a façade. A façade incorporates elements of front stages and back stages. When enacting a façade, actors attempt to shape their audience's interpretation of their interaction space as a back stage – thus offering the audience a transparent view of agent's genuine practices and thoughts. However, agents use that space of interaction as a front stage to present a performance put on for their own benefit. DeskSales' managers and employees used Siebel as a façade. They attempted to shape the interpretation of upper-level managers to have them look at Siebel as a transparent window into DeskSales' everyday operations. But DeskSales' managers and employees used Siebel as a “shop window”, in the words of one of the

unit's managers, to create a representation of compliance to avoid scrutiny and earn monetary and career benefits.

The visibility of practices or, to be more precise, the visibility of work is one of the central topics in studies of information technology and organizations (Orlikowski, 1991). The dominant approach to the visibility of computer-mediated work argues that agents can do very little to shape how their work is represented by information technology. The dominant assumption is that it is technology, not people, which produces computer-generated formal representations of work (Sewell, 1998). Managers and employees can only shape those representations by sabotaging information systems or by resisting their implementation (Zuboff, 1988). DeskSales' managers and employees, however, were able to use Siebel to represent compliance with sales and saleswork targets without engaging in the amount of sales and saleswork necessary to reach those targets, no matter how difficult these targets were. DeskSales' managers and employees were not the subjects of computer mediated supervision. They were the agents of computer mediated representation.

The remainder of this chapter reviews the literature on information technology and organizations and the literature on the visibility of practices to articulate the research problem and the research question that guide the presentation of my analysis of managers' and employees' everyday experience at Desk Sales.

FORMAL REPRESENTATIONS OF WORK AND VISIBILITY

As organizations grew from small establishments into large modern corporations, managers implemented formal systems to represent their employees work. Managers used these

information systems to keep themselves informed about their organizations' operations. As these representation systems became computerized, managers and employees faced greater challenges in keeping even part of their work away from upper-level managers. Computer-generated formal representations of work seem to leave employees and lower-level managers with only two choices – complying with prescribed goals and prescribed roles, rules and procedures, or sabotage information systems to keep some space for unprescribed work.

The way employees address this challenge holds a potential contribution to the social study of practices by sharpening our understanding of the process through which agents manage the visibility of practices.

The rise of management mediated by formal representations of work

The twentieth century witnessed the diffusion of the large corporation to an ever-increasing number of industries (Chandler, 1962; Noble, 1977). Large organizations with thousands of employees, extending across multiple geographical regions, often in different countries are no longer the prerogative of a handful of industries. Instead they have spread across the majority of business sectors (Chandler & Mazlich, 2005).

The size and complexity of the modern corporation created new managerial challenges (cf. Barnard, 1938; Fayol, 1949). As the modern corporation became more commonplace, so did these new challenges. Chief among them was the supervision of large workforces. The size of the modern corporation and its geographical dispersion made direct supervision prohibitively costly and physically impracticable (e.g., Blau, 1955). As Yates (1989) has shown, the growth of the problem of large-scale supervision led to, or at least coincided with, advances in communication technologies. Upper-level managers used these communication technologies to

establish reporting and accounting systems to supervise the work of lower level managers and employees (for a example see Sloan, 1964). Supervision and management itself became mediated processes.

To earn legitimacy (Dalton, 1950; Meyer & Rowan, 1977) and increase efficiency (Taylor, 1947), smaller organizations also adopted formal representations of work to supervise employees, leading to a more generalized use of those representations in everyday managerial work (see also Igarria, Zinatelli, Cragg, & Cavaye, 1997). Formal representations of work – particularly quantified accounts of work processes and outcomes created according to prescribed procedures – reigned supreme at the core of managers’ material experience at work.

The computerization of work in large corporations and small enterprises reinforced the centrality of formal representations of work in managers’ experience of organizations. Computer-generated formal representations of work are broader, more detailed and more quickly assembled than human-generated formal representations of work (for an account of such a change see Mann & Williams, 1960; also compare Yates, 1989; with Zuboff, 1988). Computer-generated formal representations of work are cheaper to produce when compared with their human-generated counterparts (e.g., Bain, Watson, Mulvey, Taylor, & Gall, 2002). As a consequence, managers have been provided with increasingly broad and detailed views of the process and outcomes of the work carried out by lower level managers and by employees. Computer-generated formal representations of work are instantaneous, overcoming the lag between employees work and its reporting in human-generated representations of work. Managers can observe their employees’ work as it unfolds (see Ciborra & Schneider, 1992). The computerization of work has also made formal representations of work more encompassing, thus reinforcing their centrality in managers’ work (e.g., Nidumolu & Subramani, 2003). In

modern organizations, be they large corporations or small enterprises, formal representations of work are at the core of managers' material experience of their work and at the core of their relationship with their employees.

Current perspectives on the formal representation of work

Only a limited number of studies have examined the production of human-generated formal representations of work (Crozier, 1964; Lombard, 1955; Manning, 1977; Van Maanen & Pentland, 1994). These studies show that employees are acutely aware of managers' use of formal representations of work to supervise and reward their work. Each of these studies documents a set of tactics that employees enact to shape the formal representations of their work to display compliance and earn the praise and rewards that it entails. Although the specific features of the tactics used by employees in each of these studies differ significantly, they share one important aspect. In all of these research settings, employees participate in the production of these formal representations and therefore they have an opportunity to shape these representations to display the compliance they need to earn their managers' approval and its attached rewards.

The literature on information technology and organizations is far more pessimistic when discussing employees' opportunity to shape formal representations of their work. This literature suggests that studying this topic in modern corporations where work and communication are computerized is, at best, a futile enterprise. To be sure, the literature on the computerization of work has placed formal representations of work squarely in the center of the relationship between managers and employees and in the center of each group's experience at work (e.g., Doolin, 2004). However, this literature has removed all but the slightest trace of agency from the

production of formal representations of work (e.g., Sewell, 1998; Sewell et al., 1992). This technology-centered view is based on the tight coupling between computer-assisted work and its formal representation.

Human generated formal representations of work are one step removed from work itself. Blau's (1955) social workers could see citizens in need of help without automatically creating a formal representation of their visit, and Burawoy's (1979) factory workers could manufacture products without adding to the level of output recorded in formal representations of their work. Research on computer-generated formal representations of work paints a very different picture. This research suggests that the computerization of work merges together the tools that employees need to carry out their work tasks and the production of formal representations of work. Typists cannot transcribe letters without having their keystrokes counted, call center representatives cannot answer customers' calls without having their call recorded and point-of-sales operators cannot make a sale without having it reported (for a description of electronic monitoring in each of these functions see Garson, 1988). According to this literature, even those employees whose work cannot be automatically formally represented by computers have little if any possibility of directly shaping the formal representation of their work. As Orlikowski's (1991) research on consultants shows, employees' need to scaffold the coordination of their work across time coupled with the pressure to comply with norms in their corporate culture and with formal procedures leads them to voluntarily report their work in formal representation systems. The computerization of work embeds the process through which work is formally represented in the very tools that employees need to carry out their work tasks. It is this tight coupling of work and its formal representation which limits agents' ability to directly shape the process of producing formal representations of work.

Tensions in the use of computer-generated formal representations of work

As a whole, the above suggests that formal representations of work are an important research topic that has been hollowed of interest because of the tight coupling between work and its representation created by the use of computers to both carry out work tasks and formally represent them. This tight coupling between work and its representation is problematic because it constitutes a source of tension in employees' everyday experience at work. On the one hand, as the voluminous research on unprescribed work has shown, employees routinely need to engage in work other than that prescribed by the organization (e.g., Crozier, 1964; Fletcher, 2001; Heath & Luff, 2000). Employees need to engage in unprescribed work because of the limitations of their organizations' prescribed roles, rules and procedures when achieving their organizations' prescribed goals (cf. Blau & Scott, 1962). Employees also need to engage in unprescribed work to improvise unprescribed rewards to match their interpreted level of effort at work with their total inducements from work (March & Simon, 1958; Mars, 1983). On the other hand the tight coupling between work and formal representations of work makes unprescribed work visible to upper levels of management, putting its perpetrators at risk and foreclosing any opportunity to routinely engage in unprescribed work (Bain et al., 2000; Barker & Cheney, 1994).

How do employees address this tension? Do they succumb to the awareness of ever-present managers' visibility and forfeit anything but the most canonical of practices? Or do they try to sabotage any attempt to computerize their work, seeking to keep some space for unprescribed work?

Formal representations of work and the problem of visibility in social theory

Addressing this tension sheds light on the dynamics of visibility of work in organizations and on the consequences of the use of computer-mediated representations of work. More importantly perhaps, addressing this tension promises to expand social theory's view on the relationship between the practices of multiple agents by addressing the problem of the visibility of action.

The dominant view among practice theorists (e.g., Bourdieu, 1990; Giddens, 1986; Goffman, 1967; Hagerstrand, 1967; Schatzki, 2001) is that the visibility of an agent's action shapes the extent to which that agent's practices will shape the practices of other agents. These theorists argue that the relationship among the practices of multiple agents is not decided exclusively by those reacting to an agent's practices, but also by the agent enacting that practice. As Goffman (1967) showed, agents are acutely aware that other agents are monitoring their action. That awareness leads agents to shape the extent to which others have access to their behaviors and discourse. The goal, as Giddens (1986) and Goffman (1959) have suggested, is to keep a consistent narrative of one's experience. To this end, agents manage the visibility of their action to keep to themselves specific actions that are incompatible with the narrative of their experience that they present to others. That way, agents exempt themselves from the work of having to either bracket those actions as exceptions or even exempt themselves from the more exerting work of having to incorporate those actions into the public narrative of their experience.

The dominant view among practice theorists defines space as one of the major resources available to manage the visibility of action (Hagerstrand, 1967). According to Giddens (1986), the presence availability of an agent and the visibility of that agent's actions depend on how that agent uses the features of the different settings where action is enacted. As they recursively enact

the same practices in the same spatial settings, agents “regionalize” that setting – they produce a set of norms about the material elements of that setting which rule, among other things, the type and the amount of interaction available in it. The dominant view among practice theorists distinguishes two types of settings: “front regions” and “back regions”. Front regions are produced and reproduced when agents draw on the features of a place to make the practices enacted in it visible to other agents. Front regions allow agents to display their practices to others so that they can have a role in the practices that their audience enacts. Back regions are produced and reproduced when agents draw on the material features of a place to keep the practices enacted in those places invisible to other agents. Back regions allow agents to circumscribe their practices in whole or in part, thus limiting their impact on the practices of other agents.

Research in organizations where work and its supervision are computer-mediated has shown that back stages are very difficult to enact in these contexts (Orlikowski, 1991). The experience of computer-mediated work is described as one of acting in two different spaces: the on-line space and the off-line space (Garson, 1988; Townsend, 2005; see also Turkle, 1984). The off-line space is where employees enact the non-task related aspects of their experience at work (Zuboff, 1988). This space is still regionalizable into front and back stages. The on-line space of computer-mediated work where employees carry out their tasks is always a front stage. According to the dominant view on computer-mediated work, managers use information systems to exert close supervision over employees (Ball & Wilson, 2000). Employees interpret these supervision practices as giving managers extensive visibility of their own work practices (Townsend, 2005). Under these conditions, information systems are regionalized into front stages without a corresponding backstage where employees can retreat to enact unprescribed work practices. In contexts of computer mediated work, the dominant view on the use of

information technology for supervision gives only two choices to employees: to either forego unprescribed work and only engage in work practices that can withstand the scrutiny of a front stage or to attempt to escape that scrutiny by resisting and sabotaging the use of information technology to supervise their work. The tension between these two alternatives suggests that studying how employees and managers shape the visibility of their work in on-line front stages can push social theory further by uncovering a pattern of regionalization of space that constitutes a viable alternative to front stages and back stages.

AGENCY AND COMPUTER-GENERATED FORMAL REPRESENTATIONS OF WORK

Having established that the practices with and around computer-generated formal representations of work may advance social theory by adding to the current approach to managing the visibility of practices, the task now is to formalize a research question to guide the presentation of my ethnography at DeskSales in a way that makes a contribution to this topic.

To formalize this study's research question, I review the literature on the design of formal representations of work and the literature on the use of these representations very briefly, to highlight the importance of studying the production of computer-generated formal representations of work. I then review the literature on information technology and organizations to articulate the focus of this study's research question: the production of formal representations of compliance with prescribed goals and practices without doing the work that would underlie such a representation.

Designing formal representations of work

The literature on the politics of IT choice and implementation (e.g., Markus, 1983; Thomas, 1994) and the literature on the formal classification of work (Bowker, 1994; Starr, 1995), have documented the design of formal representations of work for multiple of purposes including the supervision. According to both lines of research, formal representations of work embed the interests of their designers, not the interests of their users (see Noble, 1977, 1984). Research on the political process of information technology adoption and implementation has shown that formal representations of work are a contested outcome of a process which can unfold within or across organizational boundaries (Findlay et al., 2003). This process, however, seldom transpires to the lower rungs of the organization. Employees can be consulted when these formal representations of their work are being designed (e.g., Zweig & Webster, 2002). However, employees' agency in this and other elements of their organizations' information systems is enacted after these systems are implemented – in their everyday use (Bitner & Garfinkel, 1967; Orlikowski, 1996). This suggests that the production of computer-generated formal representations of work is an important part of the design of these information technologies because it is then that the process of design-in-use unfolds. It is this process of shaping information technology at it is used that has the power to change or reproduce the features put in place by the technology's designers (cf. DeSanctis & Poole, 1994).

Using formal representations of work

The literature on managers' supervision practices shows how managers use formal representations to make sense of their organizations (Simons, 1990). Upper-level managers can only exert direct supervision over their organizations' operations with much difficulty. The size

and geographical dispersion of modern corporations make face-to-face, direct supervision very costly, if not physically impossible. Lower-level managers have the necessary conditions to exert direct supervision. Nonetheless, the institutionalization of measurement suggests that even first-line managers will use formal representations of their employees' work as part of their interpretive process to make sense of that work (see Rosenthal, 2004; Winiecki, 2004). The formal representations of work that upper-level and lower-level managers use are finished products. Managers can improvise on those representations to support a favorable interpretation of their employees work. Such a favorable interpretation allows managers to sustain a positive sense of identity at work and to preserve their face vis-à-vis their employees. However, the formal representation of their employees' work is a material resource for this improvisation. This representation remains unchanged by its use to make sense of employees' work.

Organizational research has only recently begun to look at the material resources to which power is accumulated and exercised (e.g., Carlile, 2002). Most accounts of the material elements of political action in computer mediated contexts explain how managers use electronic communication media to enact political ploys in organizations (e.g., Romm & Pliskin, 1998). The ethnographic accounts of organizational politics have been conspicuously silent about other material aspects of power and influence in organizations. However, a close reading of such accounts suggests that managers use the contents of formal representations of work as resources in their attempts to exert political influence. Jackall (1989) and Watson (2001) show that managers use performance statistics of their units to gain access to upper-level managers and persuade them of their competence. In spite of the absence of any reference to the sources of these statistics in these studies, the broader literature on the production of work statistics suggest that there are few if any alternative sources for measures of performance beyond formal

representation of work. A unit's performance can be *de facto* changed by the rhetorical tactics that managers build around the performance statistics in these representations. Nonetheless, the representation themselves remains unchanged. Taken together, research on the design and use of formal representations of work shows that the production of such representations is a phenomenon with much to offer to the understanding of visibility of work in organizations and of how the use of formal representations of work shapes managers' and employees' work practices.

Patterns of production of formal representations of work

The dominant view of the use of information technology in organizations suggests that the production of formal representations of work has little if anything to offer to social scientists as a research topic. The production of formal representations of work seems to be a more fruitful topic for students of computer science. The literature on information technology and organizations has portrayed the computerized information systems that ground formal representations of work as providing a very tight coupling between work and its representation. This literature has attempted to demonstrate that this tight coupling is possible because computer generated formal representations of work are created as employees use the tools and resources that they need to carry out their everyday work. Qualitative studies of IT and supervision in organizations have shown that this is not only how researchers interpret computer-generated formal representations of work but also how employees interpret these representations. According to these studies, the difficulty of escaping the gaze of computer-generated formal representations of work is enough to ensure compliance (Brown, 2000; Zuboff, 1988). There is little if any need for managers to use these formal representations of work to actually supervise

employees work. Employees' compliance is ensured through a process of anticipatory conformity. The mere awareness that any deviation from prescribed roles, rules and procedures can be detected is enough to preempt any attempt at non-compliance. A few studies, however, provides accounts of employees' use of information systems in ways other than those suggested by anticipatory conformity. These accounts many not be conclusive, but they are certainly suggestive that employees can react to the awareness of full visibility of their work through patterns other than anticipatory conformity. Zuboff's (1988) research on the use of computer-generated formal representations of work tells of a lower-level manager who attempted to sabotage upper-level managers' access to formal representations of his unit's work. Orlikowski's (1991) research on consultants' use of computer-based work tools tells of a number of consultants who attempted to resist their computerized work tools with the ultimate purpose of resisting the formal representation of their work. These two practices around computer-generated formal representation of work differ in one important way from anticipatory conformity. In the 'anticipatory conformity' pattern, employees neither resist not do they attempt to manipulate computer-generated formal representations of their work. In both the 'sabotaging access' pattern described by Zuboff and in the 'resistance' pattern described by Orlikowski and in resisting information systems, employees resist these representations. There is also a suggestive difference between sabotaging access and resisting information systems. When sabotaging access, employees and lower-level managers interpret computer-generated formal representations of work as resilient to any attempt at manipulation. However, when resisting information systems, employees interpret those formal representations as vulnerable to attempts at manipulation.

Factors shaping the production of computer-generated formal representations of work

The argument above suggests that the practices around computerized formal representations of work can be placed in a four-cell matrix.

The two axes that constitute this matrix are the motivation to resist computer-generated formal representations of work and employees’ ability to do manipulate those representations. These two axes define four such practices (see table 2.1. below): resistance, sabotage, anticipatory conformity and representation work. The current research on information technology and organizations has documented the first three practices but it is still difficult to find research which documents and explains representation work. It is this last practice around the production of computer-generated formal representations of work that grounds my analysis of managers’ and employees’ experience at DeskSales.

Table 2.1. – Employees practices around the production of computer-generated formal representations of work.

		Employees are able to manipulate computer-based formal representations of their work	
		Yes	No
Employees want to resist computer-based formal representations of their work	Yes	Resist information systems	Sabotage upwards visibility
	No	? (Representation work)	Anticipatory conformity

Motivation to resist formal representations of work

One of the axes of this matrix is the extent to which employees resist formal representations of their work. This level of resistance, according to the literature on supervision and control in organizations depends on managers’ use of formal representations of work in their

relationship with employees. When managers use formal representation of work to reward performance and promote employees, then employees can benefit from managers' use of formal representations of their work. Orlikowski (1996) has documented such a case. In her study of the use of an incident reporting software in a service unit, Orlikowski showed that customer service representatives had no reason to resist their unit's information system. Instead they improvised on it to adapt it to the specific features of their everyday work. This was because managers used the formal representations of work produced by this information system to assess service representatives' performance. Therefore, service representatives not only did not resist this information system, they also willingly shared formal representations of their work with colleagues and managers to enhance learning and cooperation. Their goal was to display an image of competence and compliance that would be rewarded by their managers.

There are other studies, however, where managers use formal representations of work to supervise and discipline employees. In those cases, employees received little benefit from their managers' use of formal representations of their work. Ball and Wilson (2000) have documented such a case in their study of the use of a call monitoring system in a call center. These authors showed that first-line managers closely supervised service representatives' interactions with their customers and were quick to exert disciplinary measures once service representatives strayed away from their prescribed targets. Ball and Wilson showed that the service representatives working at this call center resisted the call monitoring system their supervisors used by complaining about its impact on the quality of their customer service. Service representatives developed multiple tactics to keep their calls invisible to this information system to escape their managers' gaze. Employees' plight under conditions of high visibility is especially serious when employees need to deviate from prescribed rules, roles and procedures to achieve their

organization's goals. Under these conditions, employees' deviation from what the organization prescribed will be detected and disciplined. However, sticking to prescribed roles, rules and procedures jeopardizes employees' ability to achieve their organization's goals. This will also be visible in computer-generated formal representations of their work and disciplined by their managers. It is difficult to find research that documents such practices around computer-generated formal representation of work. Nonetheless, Blau's (1955; 1962) research on government bureaucracies shows how these practices unfold with human-generated formal representations of work. Blau showed that first-line managers only provided very limited formal activity reports to upper-level managers. These reports only showed the results of employees' work. First-line managers did not report on employees' work process and whether it adhered to the organization's prescribed roles, rules and procedures. By doing so, first-line managers were able to shield their employees' everyday practices at work from the supervision of upper-level managers and thus avoid sanctions for failing to meet prescribed work procedures, even if only to meet the organization's prescribed goals.

Ability to manipulate formal representations of work

The other axis of the matrix is the extent to which employees are able to manipulate formal representations of work. By 'able' I mean not only being skilled enough to manipulate formal representations of work but also having the will to engage in such manipulations.

Employees and lower-level managers may interpret their prescribed information systems as difficult if not impossible to manipulate. This interpretation is not the inevitable outcome of any technology features. Instead it results from employees' skills and from the meaning they produce and reproduce surrounding their formal information systems (cf. Townsend, 2005).

When employees have low skill and will to manipulate the formal representation of their work,

their only alternatives, according to the literature, are complying or sabotaging access (e.g., Bain et al., 2000; Garson, 1988; Zuboff, 1988). If employees value the rewards resulting from favorable formal representations of their work and see no possibility of manipulating those representations, research shows that they will fall into an anticipatory conformity pattern. If employees want to avoid the sanctions resulting from deviant behavior and if they interpret the formal representation of their work as beyond manipulation, they will fall into a sabotaging access pattern. However, if employees and first-line managers want to avoid punishment and see their information systems as manipulable, they will fall into a resistance pattern.

When employees resist formal representation of work, they are able to manipulate formal information systems. These manipulations consist of using alternative tools to engage in their everyday work. By doing so, employees bypass the information systems that create formal representations of employees work. This practice exempts employees from having to sabotage upper-level managers' access to information systems while allowing them to limit upper-level managers' visibility of their work. Orlikowski's (1991) research on consultants' attempts to resist monitoring through formal representations of their tools is a case in point. Consultants were required to use a set of computer-based work tools in their everyday work. These tools produced formal representations of work that upper-level managers used to enforce compliance with prescribed rules, roles and procedures. A number of consultants, however, were able to use improvised electronic work tools which did not produce a formal representations of consultant's work accessible to upper-level managers. These consultants were thus able to resist, in part, attempts at disciplining their work practices through formal representations of their work.

The condition in which employees do not resist formal representations of work and see these as manipulable is difficult to find in the literature on IT and organizations. Under such

conditions, employees would want to get the rewards from upper-level managers' use of formal representations of employees work. However, employees would produce those representations by manipulating the production of computer-based formal representations of their work. According to the literature on IT and organizations, however, the tight coupling between work and its representation that the computerization of work entails would make such a manipulation very difficult, if not impossible to achieve. The popular business press is, nonetheless, more optimistic. In a recent critical view of life in the computerized workplace, Adams (2002) caricatured formal employees' production of formal representations of work as follows:

"A company [...] keeps its field service people on their toes by making them track how long it takes to fix customer problems. A particular customer made a complaint and waited *two years* before anyone was even assigned to work on the problem. [...] How do you think the service department tracked their performance for that customer?

Option 1: Did they report each week to their bosses – for two years – that they were incompetent?

Option 2: Did they log the customer's problem on the tracking system on the same day someone was finally assigned to fix it – two years after the original complaint – thus showing an excellent response record?"

The tactic represented by the second option allows employees to benefit from the rewards resulting from positive formal representations of work without doing the work such representations entail. This alternative is suggestive in two ways. First, this vignette suggests that there is still plenty of room for agency in producing formal representations of work, even when they are computer-generated and are used for everyday supervision. This vignette thus suggests that it is possible to reconcile two opposite dynamics in organizations. One is upper-level managers' efforts to use formal representation of work to make sense of their organization and to attempt to shape the practices of employees and lower-level managers. The other is the need that lower-level managers and employees have to deviate from formal rules, roles and procedures to reach the organization's goals or to advance their own personal interests in the organization. These two dynamics can be reconciled, as Adams suggests, through practices of representation similar to those in Goffman's (1959) explanation of face-work. Invoking Goffman highlights the

second reason why Adam's vignette is suggestive. As Giddens (1986) demonstrated in his discussion of the interjection "oops", facework entails not only acting out a line of action but also engaging in micro-level tasks that protect that line from any deviation of behavior and discourse. Adams's vignette suggests that employees' everyday experience at work creates a similar need for representation work – the work involved in producing and sustaining formal representation of work. Reading Adams's vignette from the vantage point of the ethnographic literature on work uncovers a set of challenges in addition to that of creating a representation of compliance in an organization's information system: How does Adams's engineer deal with her supervisor's ability to see her everyday work? How does she keep track of her outstanding work without using her unprescribed tracking system? Does she need the help of others in her representation work? How does she enlist that cooperation?

Thus, the formal research question that drives this study is as follows: How do employees produce formal representations of compliance without doing the work that such formal representations require? To put it simply, what this research seeks to uncover is the hidden labors of producing formal representations of compliance. To this end, I conducted an ethnography of a desk-based sales unit in a large European telecommunications company. This research setting and my data collection and analysis procedures are documented in the next chapter. This is followed by three empirical cuts at this data which are woven together in a discussion of a theory of production of formal representations of work and a theory of visibility in computerized work.

CHAPTER 3: ON DESKSALES AS A RESEARCH SETTING AND

ETHNOGRAPHY AS A RESEARCH METHOD

My goal in this chapter is to provide the background for the presentation of my analysis in the next three chapters. To this end, I explain the genesis of DeskSales, the unit where I carried out the 15-month ethnography that grounds this research and describe some of the main features of the unit and the prescribed role for its employees. I then justify my use of ethnography as a research method and provide details of my data analysis and data collection procedures.

ON E-TEL, DESKSALES AND DESK SALESPEOPLE

DeskSales, the unit where I conducted the research that grounds this study, was an outcome of the Multiple Channels to Market Program, a large planned change process unfolding at Europe Telecom, the unit's parent company. DeskSales was created to take on the low and medium complexity sales and saleswork away from Europe Telecom's field sales force. The prescribed role for DeskSales employees was thus sales-related. Desk Salespeople were the desk-based version of field salespeople.

Europe Telecom and the Multiple Channels to Market Program

The setting for this research is Europe Telecom's DeskSales¹ unit. Europe Telecom is a large European company in the information and telecommunications sector. E-Tel was founded in the 19th century as a state-owned company, becoming privatized in the early 80s, and subjected since to a considerable amount of pro-competition regulation. It now holds 73% of the

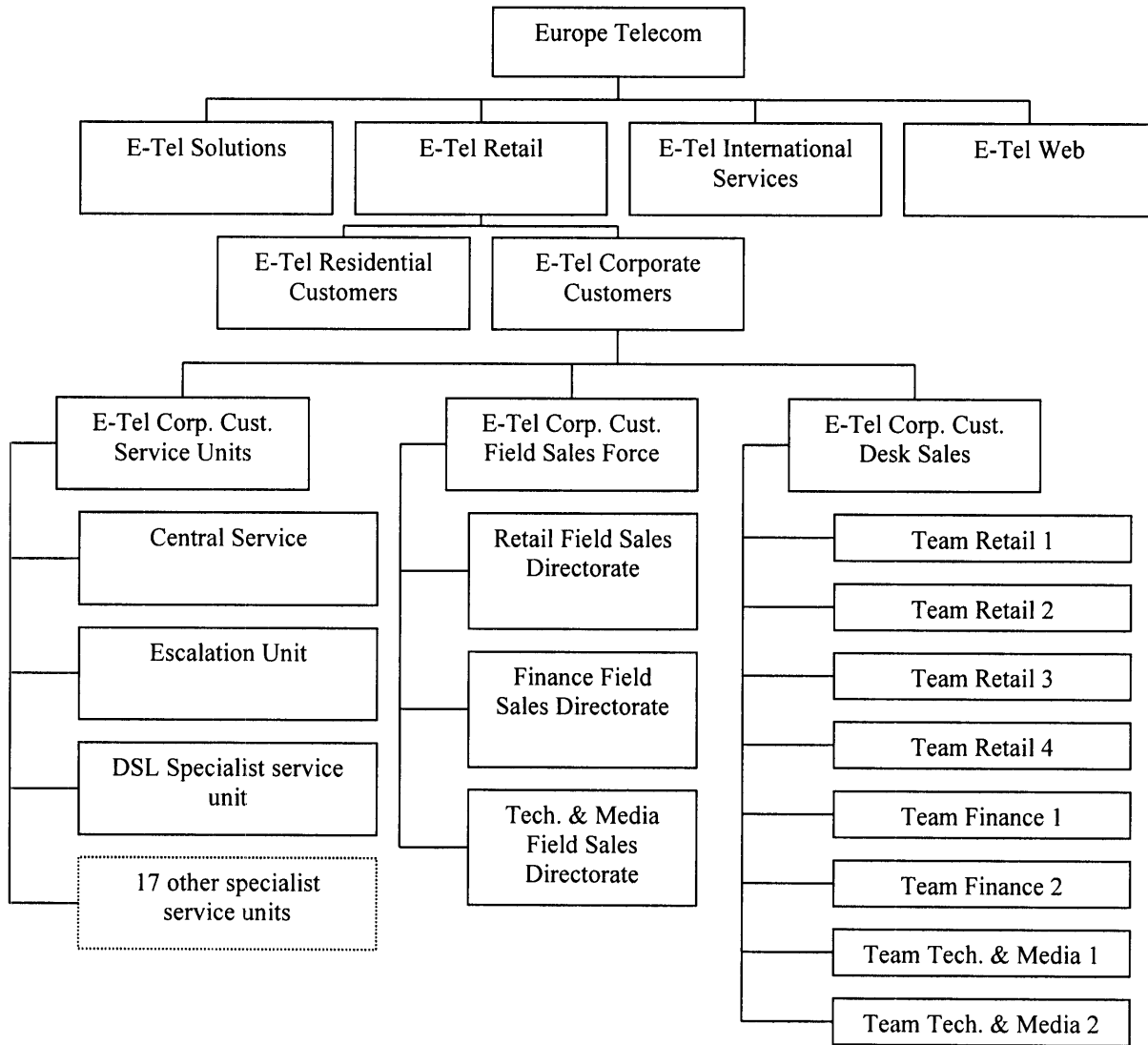
¹ All names are pseudonyms (unless indicated otherwise) to protect this study's informants. To help the reader, formal roles at DeskSales (e.g., General Manager, Desk Sales Manager, Desk Salesperson) are always capitalized to distinguish them from formal roles outside DeskSales (e.g., field salesperson, specialist service representative).

fixed-line phone market in its home country with over 20 million customers and close to 30 million phone lines. In the financial year ending on March 31st 2003, its revenue was close to 35 billion dollars, generating around 6.5 billion dollars in profit. E-Tel employs about 100,000 people, 92% of whom work in the company's domestic market. Three quarters of these employees are affiliated to the national union that represents postal and telecommunications workers.

E-Tel has four major operating divisions: E-Tel Retail, E-Tel Solutions, E-Tel International Services, and E-Tel Web. E-Tel Retail sells communication services such as voice, data and multimedia to residential and business customers. E-Tel Solutions provides communication products and services to communication companies, network infrastructure providers and to other parts of E-Tel. E-Tel International Services provides managed network solutions for corporate customers with multiple sites across Europe. E-Tel Web is the company's Internet Service Provider. The DeskSales sales unit is part of E-Tel Corporate Customers, which is part of E-Tel Retail. (See Exhibit 3.1. for an organizational chart).

E-Tel Retail generated about 20 billion dollars in revenue in 2003 with about 1.8 billion in profits. This division is home to half of E-Tel's employees. E-Tel Corporate Customers is the part of E-Tel Retail that serves the company's 4000 largest customers.

Exhibit 3.1. – E-Tel’s organizational chart.



Ever since the company was privatized, the E-Tel Corporate Customers Division has been the site of numerous change initiatives, mostly aimed at reducing costs and increasing efficiency. In early 2002, one such initiative – the Multiple Channels to Market Program (MCMP) - was launched. Its stated goal at the time, according to an internal E-Tel presentation, WAS “to provide the right information to the right customers through the *right* channels at the right time” [emphasis in the original]. Specifically:

Rather than the field sales force covering just about every customer with just about every E-Tel product, we can be a lot more efficient by making sure that the amount of each channel used by each customer maps directly onto the size of account and the various products he buys. No single channel will be used for a single customer. Each account will have a blend of channel available and it will depend on what the customer wants each time he communicates with E-Tel as to which channels he uses.

MCMP’s goal was to provide alternative channels to field salespeople (i.e., salespeople who spend most of their time meeting customers in person), who were at the time the single point of contact between E-Tel Corporate Customers and its clients. The intention was not to diversify the customer’s experience, but to reduce costs and improve efficiency. According to a study that E-Tel Corporate Customers commissioned from a consulting firm, field salespeople cost about \$325 an hour, whereas cost estimates for Desk Salespeople and a self-service website, the two channels that MCMP was to add, were \$32 and \$1.5 an hour, respectively. To E-Tel’s managers this meant that if customers used the Desk Salespeople and the self-service website to do the low-complexity transactions that tied much of field salespeople’s time, they could dramatically reduce the cost of these transactions and, at the same time, free up time for higher-complexity, higher value added activities.

To this end, the E-Tel Corporate Customers Division ran a series of pilot projects with a number of its more loyal customers to test their reaction to shifting part of their relationship with E-Tel to desk-based and web-based support. At the end of the six weeks of pilot test, the team

managing MCMP provided E-Tel's Corporate Customers Division's top management with figures that showed a reduction in transaction costs of around \$45,000, an increase of \$10,000 in sales for each account and a one-point increase in customer satisfaction (measured on a 5 point scale). This led to the decision to start developing a self-service website and to build the DeskSales sales unit to house the E-Tel Corporate Customers' Desk Salespeople.

DeskSales and Desk Salespeople

DeskSales's role in the larger Corporate Customers organization was to complement field-based sales teams with a desk-based sales organization by performing low and medium complexity sales. For the MCMP team, the desk-based nature of Desk Salespeople meant that DeskSales had to distinguish itself from two types of units within E-Tel Corporate Customers: sales oriented call-centers and the desk-based service (see below for an explanation of the role of each of these units). According to the presentation that DeskSales management used to explain their role to field salespeople, DeskSales was not a sales or customer assistance call center because:

A Desk Salesperson who is doing their job properly will not be available for approximately half the time. This is not a call centre operation where they're waiting, inactive, for the 'phone to ring, but are proactively developing the relationship, making new contacts and ultimately selling into their accounts and generating leads for the field sales teams to do the same.

This same presentation distinguished the role played by DeskSales from the role played by the desk-based service units by defining the former as an "order making" unit and the latter as an "order taking units". DeskSales was thus responsible for "quotes, up-selling, [finding] customer requirements, [and] revenue forecasting". Service units were responsible for "order placement, order tracking, order delivery, [and] faults". DeskSales took the lead when E-Tel was selling, when "the customer doesn't know what they want". Service units took the lead when the

customer was buying, when “the customer does know what they want”. Once it was fully developed, DeskSales was serving the three market-based directorates that hosted E-Tel Corporate Customer’s salesforce: Retail, Finance, and Technology and Media. Retail was the biggest line of business in E-Tel’s Corporate Customers Division and the source of DeskSales’s first set of accounts. Indeed, when the DeskSales was officially launched in late July 2002, it only had four teams, all of them working on Retail accounts. In October they were joined by two more teams working for Finance and in December two new teams took on the Technology and Media accounts.

Independently of the team they were working for, Desk Salespeople shared the same job description, which prescribed their role as follows:

Key purpose of job:

- As part of E-Tel Corporate Customers’ Multiple Channels to Market Program, to account manage nominated accounts from the desk [...]. The Desk Salespeople usually focus on medium to large companies and work in conjunction with field-based sales teams.
- The role of the Desk Salesperson is twofold:
 1. Tele-Coverage through a desk-based telephone channel - Managing customer relationships, lead generation and qualification, and driving the channels to close the leads.
 2. Selling low-medium complexity products and generating sales leads for other channels to close.
- Through this approach the Desk Salesperson will:
 - Assist the Account Team to meet and exceed revenue targets and
 - Build and develop strong customer relationships
- Deputize as necessary for Desk Sales Manager.

Given this description, the qualifications and skills required for a Desk Salesperson were stated formally as follows:

Essential:

- ‘Can Do’ attitude, with a track record of achieving targets and objectives.
- Good communicator with the ability to build relationships at all levels
- Creative, proactive and a problem solver
- Able to plan and organize own workload with minimum supervision and be a team player
- Motivated, adaptable and flexible
- A Good level of business acumen and industry awareness
- An in-depth appreciation of E-Tel’s products and services portfolio
- PC literacy
- A minimum of 1 years experience within a Desk Salesperson, or sales/sales support environment

Desirable:

- 2 years experience in Sales, Sales Support, Consultancy or Project Management.

Desk Salespeople worked from 9 in the morning to 5 in the afternoon (5:30 on Mondays and Tuesdays) in the DeskSales open-space office (see Exhibit 3.2. for a view of DeskSales).

Exhibit 3.2. – A view of DeskSales.



Desk Salespeople had three breaks during the day: one 15-minute break in the morning and one in the afternoon, and an hour-long lunch break. Most Desk Salespeople spent these breaks on the cafeteria in the building's ground floor, often sitting around with fellow team-members. Because DeskSales offered continuous phone support during regular business hours, Desk Salespeople were paired in a "buddy system". This meant that a Desk Salesperson and his or her "buddy" were never allowed to take breaks or even vacation at the same time so that when

a Desk Salesperson was away, there would be someone who would have some level of familiarity with the accounts to be able to take orders and respond to queries from customers.

ON ETHNOGRAPHY AS METHOD OF CHOICE

The analysis that I present in the next chapters can only be interpreted by understanding the procedures that I used to collect and analyze the ethnographical data that grounds this study. Before going into the details of my data collection and data analysis procedures, I want to justify my use of ethnography as a method and link it to this study's research question.

Research question and research design

The choice of research question for any study is partly determined by its author's methodological commitments. Studying the production of formal representations of work is compatible with my commitment to ethnography as a research method, a method that relies on (1) close and (2) prolonged observation (3) of a bounded group in an organization. There are two reasons that make the question of how are formal representations of work produced particularly amenable to ethnographic research.

The first reason is that the literature on unprescribed practices in organizations suggests that the production of formal representations of work has a number of local triggers instead of a few major causal factors (Ezzamel, Willmott, & Frank, 2001; Jensen, 2003; Van Maanen et al., 1994). Moreover, that same literature also suggests that practices survive and propagate through people's everyday interactions (Bitner et al., 1967). This means that only part of the data needed to document and explain the production of formal representations of work can be obtained by collecting information in organizations' records and by conducting surveys. Organizational

records are useful to provide some evidence of this process, especially of its outcomes. However, such evidence requires an intimate knowledge of unprescribed practices because people are often skilled in using formal records to cover up their unprescribed action (Lombard, 1955; Zuboff, 1988).

Surveys can be a useful way to assess the relative importance of each practice to shape formal representations of work and assess the diffusion of each of those practices. However, this presupposes a familiarity with those practices and with their causes (cf. Lee, Barua, & Whinston, 1997). Research on the design and use of formal representations of work in organizations suggests that these causes and these practices vary enough from organization to organization for the literature on this topic to be a reliable source to build questionnaires and surveys (e.g., Ball et al., 2000; Starr, 1995). This means that such research instruments are only viable after an intimate knowledge of the organization and the specific unprescribed practices performed within it.

Second, it is also more practical to study unprescribed activity in organizations (e.g., attempts to shape formal representations of work) through close observation instead of relying on research instruments that put the researcher more at a distance from participants (cf. Burawoy, 1979; Jackall, 1989; Van Maanen, 1988). In fact, most research on unprescribed uses of information technology shows how their perpetrators go to great lengths to keep them hidden from other members in the organization, including subordinates, peers and supervisors (Orlikowski, 1991; Townsend, 2005). Consequently, it is likely that they will do the same to a researcher with whom they have little familiarity and no incentives for disclosing their practices. This means that anything less than a close involvement with the unit being researched will result

in, at best, limited information about the tactics used to shape the production of formal representations of work.

In a similar vein, previous research on unprescribed work practices in organizations suggests that data on such practices requires not only close but also prolonged observation (e.g., Blau, 1955; Zuboff, 1988). This is in order to generate the trust necessary for people to be willing to make their practices visible to the researcher and because of the complexity of the process of creation and diffusion of such tactics. Previous research on unprescribed work practices in organizations shows that these are made visible to researchers after they have spent enough time in the setting to earn the trust of participants (Barley, 1990), and on some occasions only after going through some sort of test or rite of passage that reassures participants about the researcher's trustworthiness (Burawoy, 1979). In addition, research on the production of formal representations of work (Van Maanen et al., 1994) shows that these unprescribed tactics are often the result of multiple factors and events and that these emerge over time, changing as the organization evolves (cf. Orlikowski, 1996). This suggests that an adequate description and explanation of unprescribed practices requires a prolonged enough period of observation to understand the process through which these practices emerge and to understand how they develop through time.

Studying unprescribed practices in organizations such as those involved in shaping formal representations of work has historically been a single-group research project. This is largely related to trust (see data collection appendix in Kunda, 1992). Most published research on unprescribed practices in organizations describes the multiple ways in which different groups in an organization hide their unprescribed practices from other groups (Mann et al., 1960; Watson, 2001). This means that researchers who are affiliated with multiple groups may be eyed

suspiciously and be kept from observing all but the most trivial of such practices. Furthermore, the need to focus on a single group is related to the limited amount of time in the field available for many research projects (including this one), coupled with the diversity and complexity of the factors and events from which unprescribed tactics work emerge. Many research projects are limited in time and scope not only because of the researcher's own constraints but also because of the extent to which an organization is willing to accommodate intense observation (e.g., Rosen, 2000). Under such conditions, interpreting the agents' practices and documenting the most relevant factors that shape such practices for a single group may take a large share of the time that a researcher is able to commit to fieldwork. This means that studying multiple groups would require a longer presence in the field than researchers are willing, able or even allowed to put in.

Taken together, these requirements to design a study to explain the role of agency in the production of formal representations of work point to prolonged fieldwork to collect observations and interviews from a single group.

Methodological considerations and research design

There are multiple research designs available to access people's everyday practices and meanings, and to use these to explain organizational phenomena. The four major ones are phenomenology (Moustakas, 1994), grounded theory (Glaser & Strauss, 1967; Strauss & Corbin, 1990), case studies (Yin, 1994), and ethnography (Agar, 1980).

To summarize, in phenomenology the goal is to find the essential and invariant meanings of the experience of a phenomenon (e.g., Riemen, 1986). Those that approach the study of social experience from a phenomenological stance are interested in exploring how people account for

their everyday experience and often draw on the study of conversations as a source of data. In grounded theory the goal is to induce a general theory of a phenomenon by organizing observations and interviews into a model that includes that phenomenon's antecedents, its process and its consequences. To achieve this goal, grounded theory subjects data from documents, interviews and observations to three separate coding stages whose outcome is a formal model often stated as a set of propositions (e.g., Brown & Eisenhardt, 1997). In case studies, the goal is to explain the inner workings of one or a small set of bounded social settings. The focus is more on explaining the case itself and less on using it to build or test theory. Consequently, case studies include not only detailed descriptions of the target social units but also rich descriptions of their environment built from a wider variety of sources than the one often used in other research designs (Asmussen & Creswell, 1995). In ethnography, the goal has traditionally been to interpret the culture of a social group. To achieve this goal, researchers engaged in prolonged observation of their target group often by participating in the everyday life of the people they are studying. These observations are transformed into an account of a group's culture by inferring patterns from the record of people's everyday behavior and discourse (Kunda, 1992). Recently, the genre of analytical ethnography (cf. Lofland, 1995) has grown in popularity. In this type of ethnography, the goal is to understand a specific phenomenon instead of interpreting the culture of a group.

Although all of these research designs allow for explanations based on observed practices and meanings, not all are equally effective in providing analytical tools required to understand a specific social phenomenon by drawing both on the interpretive and performative aspects of practices and their process of production and reproduction.

Of the four main research designs outlined above, ethnography is the one that strives the most towards an analytical integration of practices and meanings. In this type of research, most of the data collection effort consists in observing and recording what people do and say as they go along their everyday life. Case studies and grounded theory are ambiguous in the type of data they rely on. There are grounded theory studies and case studies which focus on practices (e.g., Dougherty, 1992; and Lightfoot, 1983 respectively) but there are also studies in both case study research and grounded theory that rely on interviews to access people's meanings (e.g., Drago-Severson, 2004; Morrow & Smith, 1995, respectively). Phenomenology focuses on understanding how people experience a specific phenomenon and therefore it is less interested in everyday practices by themselves and more on how people account for them (e.g., Paper, Tingey, & Mok, 2003).

In this study I wanted to be able draw on data that include agents' practices and interpretations. To privilege either would provide only a partial explanation of the production of formal representations of work. All of the four research designs under consideration – in their canonical version – privilege either practice or interpretations as a source for analysis and explanation. Case studies and grounded theory are ambiguous in their prescription of which data to collect and analyze but the main canonical texts in both designs prescribe either a focus on meaning or a focus on practice depending on whether they prescribe interviews or observations as the main source of data (cf. Eisenhardt, 1989; Glaser et al., 1967; Strauss et al., 1990; Weinshall, 1970; Yin, 1994). Phenomenology, with its focus on people's experience does use people's account of their practices as data, but it is mostly talk and meaning which provide the data for this type of research (cf. Husserl, 1967). Ethnography is the only research design among the four that collects data on both meanings and practices. However, in its canonical version,

ethnography is an interpretive exercise and its goal is not to explain what people do. Instead it is to map the meanings held by the social unit being studied and therefore it is more interested in describing and explaining meanings than in describing and explaining practices (Agar, 1986; Clifford & Markus, 1986). Nonetheless, the use of ethnography in fields other than anthropology and sociology has led to the emergence of a different genre of this method – analytical ethnography – which focuses on a specific phenomenon instead of attempting to describe a specific culture (e.g., Jackall, 1989; and chapters in Rosen, 2000).

Analytical ethnography is thus, in my interpretation, the research method best suited to this study's phenomenon for substantive and methodological reasons.

Data collection procedures

Data collection procedures are influenced by the entry process and by the researcher's position in the field. In this case, after a year of negotiating access, including three separate visits to E-Tel, I met one of the members of the MCMP steering team who granted me access to that team and also access to the DeskSales. On the MCMP team, I observed six of the team's eight monthly meetings (from June 2002 to December 2002), taking extensive handwritten notes and interviewing the team members after the team was disbanded in December 2002.

I spent 15 months (from July 2002 to the end of September 2003) conducting ethnographic observation at DeskSales. I was initially assigned to a Desk Salesperson (one each day) by the Desk Sales Manager who was overseeing my research. After the first week, I started to take the initiative and asked individual Desk Salespeople if I could spend a day with them the following week. I spent most of my two first weeks in the field looking for and starting to develop what the literature on ethnography names privileged informants (cf. Spradley, 1980). I

eventually came to establish such a relationship with two Desk Salespeople. I was careful to focus on people with different attitudes towards their role: one of them described himself as career oriented and committed to E-Tel. My other privileged informant had a parallel career as an artist outside E-Tel and was only at DeskSales to generate a stable source of income. Both of these Desk Salespeople gave me copies of electronic mail messages and documents that they thought might be interesting for my research, negotiated my access to training and meetings, both formal and informal, and vouched for me to other Desk Salespeople. I spent a significant amount of informal time with them (7 to 10 hours a week), which I used to ask questions and check my interpretations. I was welcomed by all 79 Desk Salespeople in the unit, except for seven of them, which also had very little interaction with others.

Because of my close relationship with Desk Salespeople, Desk Sales Managers had a difficult relationship with me because they saw my fieldnotes as a record of their deviant practices, which often meant that they politely ignored my presence. A few, however, were happy with my observing their team and often invited me to team nights-out. The DeskSales' General Manager and the managers in the two hierarchical levels above her also welcomed my presence and asked me on occasion for help with menial tasks.

My role on the site was that of an observer participant (cf. Emerson, Fretz, & Shaw, 1995). My participation fell into three categories. First, I frequently joined informal conversations, especially during morning, lunch and afternoon breaks. Second, I earned the reputation of having an advanced knowledge of Microsoft Office, and Desk Salespeople sometimes asked me for help to find their way around more obscure features of this software. Finally, I was part of the DeskSales Culture Survey team. This was a team headed by the DeskSales General Manager, who asked me to join her and two Desk Salespeople in running and

analyzing a quarterly culture survey. As I was assigned to this team by the DeskSales General Manager and I had very little choice in the process. I was, however, successful in limiting my role in the team to the more menial tasks of doing charts in Microsoft Excel and making a PowerPoint presentation with them.

As a whole, this position in the field helped me define a set of research procedures that followed a daily, a bi-weekly and a bi-monthly schedule.

Daily. I spent each workday shadowing one of the 79 Desk Salespeople on the unit I was researching. I usually arrived in the office between 8:15am and 8:30am and spent the 30 to 45 minutes before the start of the workday sitting with a group of three to six Desk Salespeople while they had their breakfast. When possible, I sat with the Desk Salesperson I would shadow for the day, but often Desk Salespeople would only come in at 9:00am. At that time, I went over to the desk of the Desk Salesperson I was shadowing and asked if she or he still agreed to have me shadowing her or him for that day. The answer was always affirmative. I then brought a chair from one of the four unoccupied desks in the unit, sat in it and turned on my laptop computer.

While my laptop computer was booting up, I made the following statement:

“There’s something that I need to tell you before we start. As you know, I’m studying how Desk Salespeople work together with other people and how they use technology. I’ll try to write as much as I can about what you’ll do today. I will also note all the people you speak to and record snippets of conversations and emails. I’d also be grateful if I could listen into the calls you make and receive, provided that you feel comfortable with me doing so and allow me to ask permission of the people on the other end. Please let me know if you want me to stop taking notes or leave at anytime and feel free to look at my notes and tell me if you want me to change anything. You will notice that there will be brief notes written in Portuguese [my native language]. These are notes that I take about conversations that I may have with other people during the day. I write them down in Portuguese to protect those people’s privacy. My notes will be used for my doctoral dissertation and in academic articles. They will never be disclosed to anyone within [E-Tel] under any circumstances. Are you still happy with me spending the day with you?”

After this, I joined the team’s morning audio-call. At the beginning of the call I introduced myself and asked the team if I could join the call and take notes. During the call, I took copious handwritten notes on a small 3”x8” notepad that I transcribed later in the day, after

leaving DeskSales. During the day, I kept two types of records: a communication matrix and detailed fieldnotes. The communication matrix was a Microsoft Excel Spreadsheet with the names of all the Desk Salespeople and Desk Sales Managers in the first column and the name of the Desk Salesperson I was shadowing that day on the top of the first blank column. Each time the Desk Salesperson I was shadowing had a voice exchange with another Desk Salesperson or Desk Sales Manager, I added one to the cell corresponding to that interaction. Following standard communication analysis practice, I defined a voice exchange as an uninterrupted phone or face-to-face communication (see Heath et al., 2000). Table 3.1. shows a section of the matrix. In this example, David Robinson communicated seven times with Michelle Bligh, once with Patrick Murray, and did not communicate with Ken Moffitt. The details of each communication, including verbatim quotes were noted in the day's fieldnotes.

Table 3.1. – A section of the communication matrix.

	David Robinson
Michelle Bligh	7
Ken Moffitt	
Patrick Murray	1

I kept detailed notes of all of the Desk Salespeople activities and conversations during the day. I also asked clarification questions and often got unsolicited explanations of the day's activities. Fieldnotes were kept in separate Microsoft Word files, one for each day of fieldwork. Each of these files was structured in five major sections, as shown in Exhibit 3.3. Each fieldnote file started with the day's date and then a description of the activities I conducted during the day. This was followed by a list of the documents I obtained during the day and by the fieldnotes proper. At the end there was a list of the documents I obtained with a small abstract of what they

were. I typed fieldnotes directly into my laptop computer, with the exception of the notes that I made when I came up from morning break, lunch break and afternoon break, which I jotted down by hand on a 3" x 8" notepad. I took, on average, seven single spaced pages of notes each day. Towards the middle of the afternoon, I asked the Desk Salesperson I was shadowing if I could take a picture of him or her working. This picture was taken as to show the Desk Salesperson work area. It was normally taken from behind so as not to show the Desk Salesperson's face. Those Desk Salespeople who preferred not to have their picture taken were asked to take a picture of me pretending to be them and asked them to indicate what I should be doing.

Exhibit 3.3. – Sample fieldnotes.

Date: Thursday, February 27, 2003

Activities:

08:35am-04:00pm: Observation of Desk Salesperson Marie Robinson
04:00pm-04:30pm: DeskSales Culture Survey meeting
04:30pm-05:00pm: Observation of Desk Salesperson Marie Robinson
05:00pm-05:30pm: Informal time with Desk Salesperson Mike Wilson
07:00pm-02:00am: Informal time with Desk Salesperson John Smith

Documents:

Master Account List
P10 spreadsheet
Email and word document sent by Fred Butler + Word file
Email on Siebel usage from Major Business Senior Management
Siebel Query hints (paper and scan)

Fieldnotes:

When I sat down with Marie, she was turning on her computer. Siebel launched automatically and she launched Outlook immediately after that. She had 7 emails. One of them was from Sonali. It had the dial-in details for their morning audio call.

Marie dials in, as does everyone else on the team and says: “good morning everyone! How are you?!”

Everyone says “fine”, “not too bad”.

Sonali goes on: “any issues with Service, VNS, account managers?”

No one speaks up. Finally James asked if Simon was on the call. Sonali said that he wasn't. He was on another conference call.

[...]

Marie brought up Siebel and while she was waiting, she went through the items that she has on the page of her notepad with today's date on top. She realized that she had to do one of the things jotted there.

[...]

Documents:

1) Master Account List

An updated list of who owns what accounts together with team composition

2) P10 spreadsheet

The figures for January, only a few teams got to see this.

[...]

At the end of the day, I went through my typed notes and completed them with the ones that I jotted down on my notepad and from memory, which on average added three to four pages to the day's fieldnotes. I then scanned all the paper documents I obtained during the day and went through my email to get all the electronic documents and electronic messages the Desk Salesperson I shadowed had sent me. I saved all these files according to the following naming structure: ET YYMMDD TT X, where ET stood for E-Tel, YYMMDD represent the date, TT was the file type (e.g., EM stands for email) and X was a counter (e.g., if I got two emails on 03/02/03, these will be named "ET 030203 EM A" and "ET 030203 EM B". After this, I went through all the files and abstracted them in the day's fieldnotes file. During my time in the field, I collected 4598 files, including 764 emails, 93 Word files, 53 PowerPoint presentations, 101 Excel files, 348 photographs and 2069 pages of scanned documents. Finally, I went through the day's fieldnotes once more and made a note of questions that I wanted to ask my main informants during the informal time that I spent with them. I spent every working day at DeskSales, except if there was a special event or meeting that I was attending. I kept the Desk Salespeople's schedule: I arrived at DeskSales at around 8:30am and left at 5:30pm on Mondays and Tuesdays and at 5:00pm on Wednesdays, Thursdays and Fridays. I often walked home with one of my two main informants, normally on alternating days, which allowed me around half an hour of added informal research time every day. On Thursdays, I spent 5 to 7 hours (starting at 7:00pm and often ending at 2:00am) playing cards with one of my main informants and a group of his non-work friends. My weekly presence at the DeskSales and my informal time with informants totaled an average of 50 hours of fieldwork a week.

Bi-weekly. I interviewed each of the Desk Salespeople I shadowed one week after I had sat with them. The reason for this is that they were not allowed to be away from their desks

except for official breaks, so the one-hour lunch break was the only opportunity available to conduct an interview. I did not feel that the three hours before that break would be enough to build the necessary trust and rapport to conduct an interview. Moreover, interviewing people over lunch would not allow me to observe and participate in the informal conversations that happen during lunchtime. To address this problem, I established a bi-weekly interview and observation schedule. Exhibit 3.4. represents this schedule: on week 1, I shadowed three people that I interviewed the next week, when I was only observing two people. I interviewed these two people on week three, which allowed me to observe three people that week, and so on. On the days that I was conducting interviews, I observed Desk Salespeople who I had observed and interviewed in the past or I just sat in an empty desk and observed the whole DeskSales area. Also, the night before the interview, I went through the fieldnotes for the day I sat with the person I was interviewing and composed a set of customized questions. All interviews were tape-recorded and lasted around 45 minutes on average.

Bi-Monthly. Because some of the Desk Salespeople's activities were not contained within a day, once every two months I spent a full week with one of the Desk Salespeople, to be able to observe activities that lasted for more than one working day. Also, every two months, I did a full inventory of the physical space, which involved taking pictures of every desk, including pictures of some of the artifacts on it, and made detailed notes of what objects were on the desks and how these were arranged. I also took pictures and wrote full descriptions of notice boards and whiteboards. Finally, because of the changes in the DeskSales population, I sent a one-page description of my research to everyone in the unit every two months, so that everyone was able to give their informed consent to my observation and interviews.

Exhibit 3.4. – Observation and interview diagram.

Week 1

Shadowing Peter	-	Shadowing Jane	Shadowing Simon	-
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Week 2

Interview with Peter	Shadowing Laura	Shadowing Neil	Interview with Jane	Interview with Simon
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Week 3

Interview with Laura	Interview with Neil	Shadowing Dan	Shadowing Leanne	Shadowing Richard
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Week 4

Interview with Dan	Shadowing Sue	Interview with Leanne	Interview with Richard	Shadowing Paul
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Data Analysis

The analytical strategy I followed in this study is based on three empirical cuts of the data to match the three major challenges that I identified as being faced by first-line managers and employees in the production of formal representations of work at DeskSales.

Analysis began by articulating the major challenges that Desk Salespeople and Desk Sales Managers faced when attempting to shape the formal representations of their work and by documenting the practices they enacted to address these challenges. This was accomplished in three stages. The first consisted of performing open coding on fieldnotes, interviews and documents, following the techniques articulated in Emerson (1995) and Spradley (1980). The second stage grouped the results of this first coding into challenges and the tactic enacted to address them. This was done by sorting the interpretations and practices articulated during open coding. In the second stage of the analysis, these challenges and tactics were sorted into distinct groups in two steps. The first classified the challenges and practices based on whether they were part of Desk Sales Managers or Desk Salespeople's experience at DeskSales. The second mapped the challenges that each group faced to each group's tactics. The goal was to articulate the relationships between each of the tactics enacted by Desk Salespeople and Desk Sales Managers and the challenges they faced when attempting to shape the production of their formal representations of work. In the third stage of analysis these challenges and tactics were arranged into narratives to articulate the processes by which Desk Sales Managers and Desk Salespeople were able to participate in the production of the formal representation of their work. In addition, I conducted two separate analyses on datasets that provided increased interpretive traction on two of the three challenges that Desk Sales Managers and Desk Salespeople faced. To understand

how Desk Salespeople dealt with their experience of the first-line manager's dilemma, I conducted an analysis of a set of 51 phone-based Desk Sales Team meetings to infer the practices that Desk Sales Managers enacted in those meetings to address that challenge. To understand how Desk Salespeople were able to coordinate their unprescribed work without a prescribed information system, I conducted an analysis of the material artifacts that Desk Salespeople used in their everyday work to identify the types of artifacts that scaffolded the temporal coordination of their unprescribed service work

To keep with this analytic flow, I organized the presentation of my analysis in three chapters corresponding to the three challenges that Desk Sales Managers and Desk Salespeople faced when attempting to shape the formal representations of their work. Before going into this analysis, I discuss the limitations of this research.

Limitations of the research

This study has two major sets of limitations, those related to the characteristics of its method of choice and those related to the characteristics of its research setting.

Because it is an ethnography, this research may be seen as (1) not generalizable beyond its research setting, (2) not having enough degrees of freedom to test the researcher's interpretations, and (3) being vulnerable to the researcher's influence on the study's setting.

To be sure, it is difficult to claim that a study of a single social unit is generalizable to other units in the same organization, let alone other units in other organizations. This, however, is true only if generalization means sampling-based generalization. In this type of generalization, the point is to use a sample from a population to discover the distribution of its members along a set of dimensions. For this process to give accurate results, the sample needs not only to be large

enough to be statistically powerful, it also has to be chosen carefully so that no section of the population is more likely to be represented in the sample than others.

The research setting that grounds this study was the outcome of a negotiation process with the larger organization to which this unit belongs. Consequently, this research makes no claims to statistical generalization. It does, however, claim replication-based generalization (cf. Campbell, 1975). In this type of generalization, the point is to describe and explain a specific set of practices as richly as possible. The goal is to have a rich enough case so that this set of practices can be observed in multiple circumstances and variations. The centrality of the production of formal representations of work for the people working at DeskSales and the improvisational nature of the tactics they enacted to attempt to shape those formal representations underscores the richness of the DeskSales as an empirical setting to study this process.

Another related limitation is ethnography's lack of degrees of freedom. Even the more canonical prescriptions for conducting ethnography suggest that interpretations should be tested in the course of analysis (e.g., Spradley, 1980). If there are not enough different observations to provide the necessary degrees of freedom to test interpretations, then it is difficult to assess if an ethnography has any value. This view, however, is grounded in a narrow sense of degrees of freedom. First, although this is study of a single social unit, there are 79 people in it, corresponding to, at least, to that same number of observations. Second, these people are observed performing a variety of practices in a variety of conditions, thus multiplying those observations manifold.

The approach followed in this research is close to that suggested by Campbell (1975), which distinguishes empirical degrees of freedom from theoretical degrees of freedom. Single

unit studies, such as this ethnography, cannot claim empirical degrees of freedom, that is having many observations of the same variable, because even with 79 participants, it is very difficult to reach the number of degrees of freedom needed to support the rich explanations characteristic of this type of research. The solution suggested by Campbell is to substitute theoretical degrees of freedom for empirical degrees of freedom. The point is to use many theories to test an observation, instead of using many observations to test a theory. In this research, the decision to focus on the production of formal representations of work was only taken after two months of observation during which I thought through the literatures to which this research could contribute. The three major literatures considered included change, control, and formal representations of work in organizations. The latter was the one that seemed to explain the most salient events and challenges in the research setting.

A final major limitation that results from choosing ethnography as the method to perform this research is the potential impact that the researcher has on the research setting. Although my role in the research setting leaned more to the observation side of observant participation, I acknowledge that I did influence what happened in my research setting. However, I used that influence as data by keeping track not only of my interventions but also of how people reacted to them and their consequences. My participation in the Culture Survey Team was a case in point. Although, by choice, my role in this team was limited to producing the Microsoft Excel graphics and the Microsoft PowerPoint slides that showed the survey results, I chose to use a template that made problems more visible than successes. When these graphics were made public, I paid close attention and took extensive notes on how they were used by both managers and Desk Salespeople. I believe is that it is more dangerous to ignore the influence that any research

instrument, be it a survey or an ethnographer, has in the research setting than recognizing and documenting that influence.

Because each research setting has its own idiosyncrasies, these can also limit the value of a study's results. DeskSales has three major characteristics as a research setting that impact this study's results. First, Desk Salespeople' work and its representation were, at best, loosely coupled. This is an important feature of this setting for the purposes of this research because it allows me to study the production of formal representations of work outside one of the most pervasive assumptions in the literature on information technology and organizations: that work and its representation are tightly coupled. However, this means that the tactics that Desk Sales Managers and Desk Salespeople enacted to shape the formal representations of their work may be very different from those that constitute the production of formal representations of work in settings where work is tightly coupled with its representation. Although this limitation is hard to dispel and should be taken into account when interpreting the results of this research, one should also bear in mind the points made above regarding generalization. Moreover, the purpose of focusing on a setting where work is loosely coupled with its representation is to make these practices more visible and thus potentially more informing. There are also many clues in the ethnographic research in organizations that point to the possibility that people's everyday work practices produce and reproduce a looser coupling between work and its representation than the one that this research has portrayed (see e.g., Kunda, 1992; Mars, 1983; Thompson & Ackroyd, 1995). Second, work in this setting is mostly computer-assisted. The point here is not to espouse views that follow the assumptions of the technological imperative (cf. Markus & Robey, 1988). Instead, the goal is to acknowledge that people have a different set of resources to enact their everyday work practices than they would have if their work was not computer assisted (cf.

Orlikowski & Iacono, 2001). Again, it is necessary to take into account the point about generalization made above. In addition, it is always dangerous to dismiss or underestimate people's ability to improvise. There are more ways than one to enact the possibilities of action allowed by computer-assisted work. Moreover, this is perhaps the less idiosyncratic characteristic of this research setting as computer-assisted work spreads through organizations (Garson, 1988; Poster, 1990).

Finally, there are a number of characteristics of the setting that may systematically affect its results. The most often mentioned of these in the literature are those related to national culture. Both Hofstede (1980) and Trompenaars (1994) suggest that there are variations in national cultures which can make the results of the soundest research design invalid in any country other than the one where the research was conducted. This, in my view, overestimates the strength of a country's culture and underestimates the extent to which culture is produced and reproduced in everyday practice. However, even if we take the national culture argument at face value, a strong national culture would get embedded in people's everyday practices and would thus be an integral part of the description and explanation of the processes observed at the research setting. Moreover, Desk Salespeople come from very different national backgrounds, ranging from Jamaica to India, and including England, France, Germany, Lebanon and Brazil. This means that the differences in national cultures, if any, are likely to be visible in the differences in work practices among people from these different cultures.

Taken as a whole this set of limitations does not seem to threaten the value of this study, but it provides the context for the interpretation of its findings, which are presented in the next three chapters.

CHAPTER 4:

FACADE-CREATION AS A STRATEGY TO ADDRESS THE FIRST-LINE

MANAGERS' DILEMMA

INTRODUCTION

First line supervisors occupy a crucial juncture in the production of formal representations of work. They are at the center of a tension between the push to enforce prescribed roles, rules, resources and goals and the pull to adapt to their employees local contingencies. This chapter looks at how Desk Sales Managers, DeskSales' first-line managers addressed this tension.

On the one hand, first-line managers are the only level of management that is close enough to employees to be able to face directly the inadequacy of prescribed rules, roles and procedures. They are the only level of management which is close enough to employees to be able to directly observe the everyday contingencies that employees need to adapt to as they carry on their everyday job. These contingencies can be of two types. One type of contingency results from the idiosyncrasy of employees' tasks. Differences between ideal and actual customers (Lipsky, 1980; Prottas, 1976) and differences between ideal and actual work processes (Orr, 1990) require employees to improvise their own rules and procedures. These improvisations are functional in the sense that they allow employees to keep the organization's work going when formal processes fail. The other type of contingency is the result of the idiosyncrasy of employees' competence and interests. Differences between a job's required skills and employees actual skills challenge employees to improvise ways to reduce their skill gap. Differences

between ideal employees' interests and employees' actual interests challenge employees to improvise ways of meeting their own interests while at least maintaining the appearance of caring for the organization's interests. These improvisations are dysfunctional for the organization. When matching their job's prescribed skill set to their own skills, employees improvise ways to engage in their work tasks without having the full set of skills they need to do so (see Doolin, 2004; Gasser, 1986). When pursuing their own interests, employees engage in petty workplace crime (Mars, 1983) or, at least, use their organization's resources for their own purposes. First-line managers' direct access to these improvisations puts them acutely aware of the inadequacy of formal representations of work to represent the effort that employees put into unprescribed action that benefits the organization. First-line managers' proximity to employees' unprescribed action also makes them aware of the need to hide petty deviance from those formal representations of work, to secure employees' effort to carry out the improvisations needed to keep the organization functioning (Gouldner, 1954)².

On the other hand, first-line managers have a stake in enforcing compliance with prescribed roles, rules, procedures and goals, and in having that compliance shown in formal representations of work.

The prescriptive literature on supervision argues for, and the descriptive literature on this topic shows that supervisors' evaluation and rewards are indexed to their employees' compliance with prescribed goals, roles, rules and procedures (Drucker, 1993; Ivancevich, 1974; Kamoche, 2000). First-line managers are the level of management with closest access to employees' activities and thus they are best positioned to enforce employees' compliance with prescribed

² See especially Gouldner's (1954: 105-136) description of the high degree of tolerance that supervisors in the mine had towards their employees, including frequent disregard for prescribed procedures, frequent absenteeism, and a recalcitrant attitude. Supervisors enacted this high degree of tolerance because they interpreted these practices as legitimate for employees working in the conditions offered by the mine and because they wanted to secure miners' willingness to come to work and put as much effort as they could into their tasks.

elements of their organization (cf. Webb et al., 1998). Consequently, first-line managers' performance is best assessed by their ability to enforce such compliance (Downs, 1966).

The ethnographic literature on managers' work (e.g., Watson, 2001) has shown that managers use their employees' compliance with prescribed goals and prescribed roles, rules and procedures to create and maintain an image of competence. The argument is similar to Goffman's (1959) approach to social identity. If peers and upper-level managers are aware that a supervisor's employees are falling short of prescribed goals, that supervisor has to engage in considerable effort to maintain an image of competent leadership and professional competence (for a number of graphic examples, see Berg, 1979; Pettigrew, 1985).

Finally, first-line managers also have a stake in their employees' compliance with prescribed goals and prescribed roles, rules and procedures because first-line managers can use that compliance as a resource for political ploys in their organization. Research on the political nature of decisions in organizations (cf. Buchanan, 1999; Markus, 1983; Pfeffer, 1992) and research on the political nature of managers' careers (e.g., Jackall, 1989) have both shown how first-line managers use their employees compliance with formal elements of their organization to advance their own agendas and their own careers in the organization.

As Yates (1989) has shown, managerial practices, institutional pressures and the use of information technology (writ large) in organizations, have given formal representations of work the central role in showing compliance with prescribed goals and with prescribe roles, rules and procedures. For this reason, first-line managers' stake in their employees' compliance with the prescribed elements of their organization includes a stake in the visibility of their employees' activity in formal representations of work.

First-line managers are thus subjected to two opposing forces which together constitute what may be labeled the ‘First-line manager Dilemma’. One is the improvisational pull – the need to sanction improvisations to keep the organization going and to keep those improvisations invisible from formal representations of work. The other is the bureaucratic push – the top down pressure to enforce compliance with prescribed goals and prescribed roles, rules and procedures, and to make that compliance visible in formal representations of work. First-line managers at DeskSales, or Desk Sales Managers, as they were called in the unit, faced these two opposing forces³. They felt a top-bottom push to achieve their sales and saleswork targets⁴ and display that achievement in Siebel – E-Tel’s formal management information system. They also felt a bottom-up pull created by Desk Salespeople’s limited ability and willingness to reach those targets which had to be kept hidden from Siebel. To which of these forces did Desk Sales Managers yield?

During its first 18 months of activity, DeskSales was led by two successive General Managers: Carmen and Mariah. The two leaders of the unit differed sharply in their management style. The bureaucratic push created by Carmen was significantly different from the bureaucratic push created by Mariah. Both General Managers delegated to Desk Sales Managers the day-to-day leadership and supervision of their Desk Salespeople. However, both Carmen and Mariah implemented a bonus and a set of rewards with the intention of shaping Desk Salespeople’s

³ The term “improvisational pull” is used in cinema to refer to actors’ tendency to improvise on their roles (see Naper, 2003). The term “bureaucratic push” is used in democratic theory and in foreign policy studies (see Hymans, 2006) to refer to the central government’s enforcing rules and decisions over private citizens and the military. Notice that democratic theory uses the term “citizen pull” to refer to pressures of a country’s population over its government. However, citizenship has some important differences from employment which make the term “citizen pull” more of a metaphor than a descriptive label (see Stohl & Cheney, 2001).

⁴ The distinction between sales and saleswork is my own. By sales targets, I mean targets related to outcomes, such as the revenue of products and services sold by Desk Salespeople. By saleswork targets, I mean targets related to the sales process, such as the number of calls made to customers and the time spent making those calls.

actions. The difference between each General Manager's bonus and rewards led to two different consecutive types of bureaucratic push over Desk Sales Managers.

THE DESK SALES MANAGER DILEMMA UNDER CARMEN

The tension between the bureaucratic push to enforce sales and saleswork targets and the pull to adapt to employees lack of will and skill to sell was not a strong one during Carmen's tenure as DeskSales' General Manager. Carmen committed to stretch targets but she only needed a plausible account of Desk Salespeople's involvement in a sale to accept it as an outcome of Desk Salespeople's saleswork. Her ad-hoc bonus which paid a lump sum for Desk Salespeople's involvement in sales of one million dollars or more was enough to motivate Desk Salespeople to persuade their field sales teams to allow them to claim involvement in part of their sales. Desk Sales Managers had thus little more to do than to concoct plausible stories of Desk Salespeople's roles in these sales to tell Carmen. The specific practices that produced and reproduced the bureaucratic push and improvisational pull under Carmen's leadership, and Desk Sales Managers' tactics to have their Desk Salespeople engage in representation work to create a façade of compliance with Carmen's targets, as explained next, highlight some of the core features of Desk Sales Managers' tactics to address the first-line manager's dilemma at Desk Sales.

Bureaucratic push

Carmen was the first General Manager to head DeskSales. For Carmen, DeskSales' chief challenge was to prove its value to E-Tel as a whole. In a meeting with the whole unit, Carmen described her role as "running a PR [i.e. public relations] campaign" for DeskSales. She told

Desk Salespeople, “you are all internal champions” to emphasize that DeskSales needed to convince the rest of E-Tel of its merits as part of the company’s sales organization. She urged Desk Salespeople to send her their “success stories,” promising that “David Purkiss [E-Tel’s CEO] will want to shake hands with those of you who have success stories.” For Carmen, DeskSales was under probation during its first few months of existence. She saw herself as the one charged with, in her own words, “selling” the unit to the rest of the company. Looking back on her experience as a Desk Sales Manager, Carmen explained how she treated the rest of E-Tel as DeskSales’ customers:

My customer relationship management skills are my core strengths. People management and relationship management is what I do really well and what I really enjoy. You know, I really promoted [Desk Sales] within the General Management community and by doing that they really bought into the model of the Desk Salesperson. [...] That’s the result of being tough with other managers and help them visualize the value of the Desk [...] In terms of outside DeskSales, I [used] a defined contact strategy by understanding each GM’s personal characteristics to create an individual approach to each sector.

Carmen’s view of her role as that of promoting DeskSales shaped her management practices. Carmen used the unit’s sales target to showcase DeskSales’ value to the rest of E-Tel. DeskSales’s goal as a unit was to achieve a yearly sales target. The formal process to determine Desk Salespeople’s target was a simple one. First, E-Tel’s senior managers decided the unit’s yearly sales target. This sales target was handed down to DeskSales’ General Manager. DeskSales General Manager then divided that target by the number of Desk Salespeople in the unit to calculate each Desk Salesperson’s individual target. Desk Sales Managers’ targets were the sum of the targets for their Desk Salespeople. These targets were announced at the beginning of each sales year, in a face-to-face meeting between DeskSales’ General Manager and the rest of the unit.

Carmen did not follow this process. Instead of taking the target that was handed down by E-Tel’s senior managers, she gave each Desk Salesperson a target of one million dollars in sales

of “low to medium complexity products.” When she announced this target, Carmen conceded that it was “a signpost on the ground” that would “allow us to show the value added by Desk Salespeople.” Her approach was thus to have a stretch target for each Desk Salesperson. The goal was to over-achieve the unit’s sales target to prove its worth and success. Mariah also created a set of saleswork targets. Desk Salespeople had to make 30 calls a day to their customers and spend a total of 3 hours on the phone everyday. This allowed Carmen to show that Desk Salespeople were not only getting good results, as shown by their sales figures, but also putting a significant amount of effort into selling to their accounts.

Carmen supervised and rewarded Desk Salespeople’s progress towards reaching their sales target and Desk Sales Managers for having the highest number of Desk Salespeople in their team which were on their sales target or above it. Andrew, one of the first Desk Sales Managers to join DeskSales described Carmen as a “motivator” because she set ambitious targets for the unit but did not enforce the process of achieving these targets. In practice, Carmen supervised Desk Salespeople’s sales and saleswork using two separate systems: Siebel and Eytel. Siebel is a sales automation system that is designed to help salespeople throughout the sales process. Siebel allows salespeople to store and access information about their customer contacts; keep track of their present and past saleswork and store and access information about their open sales. In addition to helping salespeople engage in sales and saleswork, Siebel is also a management tool. It allows managers to scrutinize and supervise their salespeople’s sales and saleswork. Carmen’s skills with computers and software were, however, very limited. She did not know how to use Siebel to monitor Desk Sales Teams’ sales performance. She had Desk Sales Managers report to her all the large sales in which Desk Salespeople were involved. Desk

Salespeople were considered to be involved in a sale when their name was recorded in the sale's record on Siebel.

Carmen used Eyetel to measure Desk Salespeople's saleswork. Eyetel was an information system that kept track of Desk Salespeople's use of their phone. Eyetel was capable of reporting at a very fine level of detail. Nonetheless, Carmen only asked to receive reports that tracked Desk Salespeople's total call time, the number of calls they received and the number of calls they made. These reports also included the time that Desk Salespeople spent at their desk and the time they had spent away from their desk during the workday. Exhibit 4.1. shows a sample page from one of these reports.

In summary, Carmen did not directly supervise Desk Salespeople's sales and saleswork. Instead, Carmen supervised Desk Salespeople's reporting work on Siebel. If a Desk Saleswoman did a lot of work for a sale, but her name was not on that sale's Siebel record, that sale would not count towards her target. However, if a Desk Salesman did not do any work for a sale but his name was on that sale's record in Siebel, it would count towards his target. Carmen paid little if any attention to Desk Salespeople's saleswork as measured by their use of the phone because Desk Salespeople reported sales were keeping the unit well above its target.

Carmen designed Desk Salespeople's bonus to motivate them and reward them for selling to their customers. Desk Salespeople could earn as much as 30% of their yearly salary in bonus. During Carmen's tenure as DeskSales' General Manager, Desk Salespeople's bonus had two elements. One was meant to align their actions with the interest of the account team. This element, which amounted to 70% of Desk Salespeople's bonus, was paid on the revenue generated by the account as a whole. Specifically, this part of the bonus was paid if the total sales to each of Desk Salespeople's accounts matched the revenue target that E-Tel's top management

Exhibit 4.1. – A page from a phone-usage report during Carmen’s tenure showing phone usage for two Desk Sales Teams (times in hours:minutes).

DeskSales Daily Stats Report - 07-29-03

Andrew Barton's Team

Name	Ext	Time at desk	Calls Answered	Calls Made	Time away from desk	Total Talktime
George Beatty	2020	8:18	1	21	0:04	2:43
Thomas Dean	2021					
Jeffrey Hornsby	2022	6:26	0	27	0:00	2:12
Judy Houghton	2023					
Thomas Lenar	2024	16:14	2	14	2:33	0:56
Tara Radin	2025					
Joe Taylor	2026	4:51	0	58	0:00	3:27
Larry Howard	2027	7:51	3	81	0:06	3:43
John Mohr	2028	8:02	0	39	1:04	3:22
Michael Putnam	2029					
Total		51:42	6	240	3:47	16:23

Linda Tegarden's Team

Name	Ext	Time Logged On	Calls Answered	Calls Made	Time in Not Ready	Total Talktime
David Thompson	2030	8:14	2	34	0:00	1:21
David Robinson	2031	7:05	0	28	0:00	1:25
Ruth Blatt	2032	6:54	2	45	0:02	2:54
Chris Boone	2033					
Sherry Finney	2034	7:11	0	116	0:52	2:35
Susan Sher	2035	7:12	0	5	0:00	0:56
Joseph Simons	2036	17:04	2	15	0:36	1:13
Cynthia Thacker	2037	7:07	0	35	0:11	1:15
Jerome Thagter	2038					
Donald Troth	2039	7:26	5	22	0:17	1:23
Robert Schendel	2040	7:01	3	35	0:07	2:00
Mark Gaulding	2041	7:26	1	32	0:32	1:42
Patrick Murray	2042	8:17	1	14	1:15	1:17
Total		90:57	16	381	3:52	18:01

had set for those accounts. The other element of Desk Salespeople's bonus was meant to motivate Desk Salespeople to sell directly to their customers. This element, which amounted to 30% of Desk Salespeople's total bonus, was paid on the revenue generated exclusively by Desk Salespeople. Specifically, this part of the bonus was paid if the total sales Desk Salespeople reported on Siebel as an outcome of their own work met the one million dollars target she had set for each Desk Salesperson. Desk Sales Managers and the DeskSales General Manager could make as much as 50% of their salary in bonus. Desk Sales Managers only earned their bonus, however, if every single Desk Salesperson on their Desk Sales Team hit their targets. DeskSales' General Manger only earned her bonus if every Desk Sales Team hit its targets.

Carmen's bonus plan was consistent with Desk Sales Managers' and Desk Salespeople's targets. If this plan was implemented as designed, Desk Salespeople's bonus would help Desk Sales Managers achieve their teams' targets. Carmen's implementation and use of her own bonus plan, however, was more of a hindrance than a help to Desk Sales Managers' attempts to achieve their targets. Carmen never used her bonus plan. Instead she had a set of ad-hoc incentives that she used to reward the unit's top performers. In the unit's weekly meeting she instituted, Carmen awarded bottles of wine and champagne to the Desk Salespeople that had reported the most sales for that week. Carmen also created an ad-hoc incentive she labeled "who wants to be a millionaire." Through this incentive, Desk Salespeople who made sales of a million dollars or more earned 250 dollars in shopping vouchers⁵. Moreover, during Carmen's tenure, Desk Salespeople's bonuses seemed not to be linked to performance at all. Between July 2002 and September 2002, only a small number of Desk Salespeople had been assigned to account teams.

⁵ To put it simply, to achieve their target Desk Salespeople had to be involved in sales totaling one million dollars. However, they would only be financially rewarded when they were involved in an individual sale of one million dollars or more. If a Desk Saleswoman was involved in two sales worth 500 000 dollars each, she would hit her target but not earn any reward. If that same Desk Saleswoman was involved in a sale worth 1.2 million dollars, she would hit her target and earn a reward.

Carmen decided to pay 100% bonus to everyone for those months. In October, the unit faced cash flow problems and Carmen paid only 50% of the total bonus to all of the Desk Salespeople in the unit. In November everyone got 150% bonus, to compensate for the smaller payment in the previous month.

The bureaucratic push under Carmen's leadership was driven by her "stretch" sales and saleswork targets. This bureaucratic push was strengthened by an incentive that only rewarded large sales, but it was relaxed by Carmen's failure to use the bonus system and her exclusive reliance on computer-mediated supervision.

Improvisational pull

Desk Sales Managers had to rely on their Desk Salespeople to hit the sales and saleswork targets set by Carmen. Desk Salespeople, however, had to hit their sales and saleswork targets under challenging conditions. Desk Salespeople did not have sales skills and they were not trained to sell. With the exception of the 17 Desk Salespeople that joined DeskSales at its start, all the other Desk Salespeople were hired from temporary staffing agencies or from E-Tel residential call centers. Those Desk Salespeople that joined the unit at its start had experience in telesales to small and medium sized companies. Those Desk Salespeople who joined DeskSales from temporary staffing agencies had little if any work experience. Those who did have work experience had worked in customer service call centers such as directory inquiries or emergency response. They had no sales experience with either residential or business customers.

The training that Desk Salespeople received upon joining the unit was meant to address Desk Salespeople's inexperience with sales. The management team responsible for designing and implementing DeskSales created a 6-week training program for new Desk Salespeople. This

“induction training,” as it was called at DeskSales, was designed by one of the members of the management team and by Christine, a senior E-Tel trainer. This trainer took the responsibility for all of Desk Salespeople’s training, including administering it herself. As it was designed, the induction training program was divided into four modules. In the first week, the incoming Desk Salespeople would be introduced to E-Tel. They would be briefed on the story of the company, its recent changes in the process of creating DeskSales. During that first week, Desk Salespeople were to take seven different computer-based training courses on legal compliance⁶ and a personality questionnaire. During the second and third week, Desk Salespeople were to attend twelve presentations given by the product managers responsible for the products that Desk Salespeople were to sell to their customers. In the next two weeks, Desk Salespeople would be trained in the use of the three information systems they would need to be able to do and report sales and saleswork. The final week consisted of a telesales training program outsourced to a consulting company.

The reality of Desk Salespeople’s training was quite different. Christine, their trainer, consistently arrived one to two hours late for training. She took two hours for lunch and allowed Desk Salespeople to leave one hour before their official end of the workday, at 5 pm. The batch of Desk Salespeople with whom I attended training spent two to three days a week sitting with other Desk Salespeople rather than in formal classroom training. They only spent a total of fourteen days in the classroom. In the first week they had two days of training. One introduced the incoming Desk Salespeople to DeskSales and to their role. On the second day, the trainer explained the bonus plan. In the second week there were six hours of classroom training spread evenly across three days. These three days were spent learning about all the information systems

⁶ In Europe, telecommunication companies such as E-Tel have to obey stringent regulatory laws, especially regarding the use of customer information.

that Desk Salespeople had available, except for Siebel, which they learned during their third and fourth weeks of training. Desk Salespeople spent a total of five days learning Siebel by watching in-class demonstration and doing a number of practice exercises. In their third week of training, this group of Desk Salespeople had a day of product training. This training lasted a whole day and focused on the five types of products that E-Tel's senior managers defined as priorities for the field sales force. The last week of training was spent discussing the results of the personality questionnaire Desk Salespeople completed in their first week. This batch of new Desk Salespeople waited 10 weeks for their telesales training, which they took together with two other groups of Desk Salespeople that were hired after them. Desk Salespeople were not assigned to any accounts until their formal six weeks of training were over. When they were not in the classroom, newly hired Desk Salespeople spent their time loafing, socializing and complaining about the inadequacy of their training. Desk Salespeople were concerned with the way training was delivered because they felt they could not handle even the simplest of requests. The week after the training ended, Ted, one of the Desk Salespeople in my training batch, complained to the other Desk Salespeople in his cohort that he got an email from his field account manager asking Ted to price a product. Ted confessed, "I couldn't understand a word of what was written in it [his field account manager's email]." Ted and his cohort went to speak with their trainer, Christine. Ted told Christine about his field account manager's email and Christine told him to send it to a product specialist for pricing. She said that Ted should have been trained on these products. Simon, one of the Desk Salespeople in Ted's cohort complained, "we don't know what we don't know." Ted asked Christine to show them a list of what they should know and check what they were missing. Christine went through the list item by item. On many of the items, she

said, "we briefly touched this," "we roughly saw that," "we didn't have time for this." The feeling was that everything was treated very superficially and a lot of topics were not covered.

The way training was implemented at DeskSales did not address the lack of sales skills that new Desk Salespeople suffered from. Instead, they only added to Desk Salespeople's interpretation of themselves as lacking the experience and the knowledge to sell.

This lack of sales skills and sales training was amplified by difficult relationships with field salespeople. During Carmen's tenure Desk Salespeople were in the early stages of their relationship with their field sales teams. During these first few months, Desk Salespeople had to face resistance from field sales people. Field salespeople considered their accounts as their own territory which they often had to defend against other E-Tel units. Roger, a field salesman in one of E-Tel's largest accounts, explained how he had to keep managing forays into his account by other E-Tel units:

[W]hen you are responsible for an account, you have to make sure that anyone that is going into the account is going there to do good rather than bad. And you really have to make sure that they're really going there with a reason and they're adding value and not because they've been told to do it. And that happens a lot within E-Tel. You have a lot of people suddenly going into your account and saying, 'I'm your new sales person and I'm responsible for payphones' and then you get the customer saying, 'hang on, I have an account team and you're not my sales person, these are my sales people'. So you have to educate people that yes they are open to everybody but it has to be done in a controlled manner and not having people just going in there with their own agenda.

Donald, a Desk Salesman in one of the two Finance Desk Sales Teams, voiced a common complaint:

[My job] is quite frustrating, at the moment. I find it quite difficult to get into the account. Quite difficult to sell. Because there is no sort of broad scope. There are no IT teams you need to sell to, so as it's quite it's a large account team, they're involved in sort of building the networks and the relationship with the customer, it's quite hard to actually define, it's quite hard for me to get into the account and find a specific role in it. So I find myself just getting on, getting on with [service issues such as] backup for the systems engineers and that sort of stuff so it's quite frustrating at the moment actually. [...] There are so many things that restrict you from doing your job on a daily basis which I think sort of hinder the chances and the possibilities of moving on. For example Siebel and stats and everything else. You just get so caught up in doing these things. And I know why they're there. But we get so caught up in all of these things that we actually lose focus in trying to get into the customer. Actually talking to them and building that friendship.

Meeting saleswork targets was as difficult as meeting sales targets during the first few months of DeskSales existence. There were only a limited number of people that Desk Salespeople could call on each of their accounts. Desk Salespeople dealt with E-Tel's largest 100 customers, most of which were Fortune 500 companies. These organizations typically had a central purchasing unit for information and communication technology, which was the prescribed focus for Desk Salespeople's sales efforts. Consequently, 3 hours worth of 30 phone calls a day was a very difficult target to achieve.

In one of her first meetings with all the Desk Salespeople Carmen suggested a tactic to win over field salespeople's resistance. She told Desk Salespeople that "we need to make sure that Siebel is accurate [i.e., no errors on records and up to date] ... 70% of your target comes from your account teams getting their [sales] targets." She continued "if you update Siebel [for your field salespeople], you'll be allowing your field salespeople to do multi-million dollar deals." She said that people didn't have to do it forever but that they could play an important role by doing it now, and that would help to establish them as full members of their accounts.

Desk Salespeople followed this suggestion. However, instead of doing field salespeople's Siebel to earn their trust, Desk Salespeople took over a plethora of menial tasks that field salespeople had to engage in. Desk Salespeople did these tasks for field salespeople in exchange for being able to represent themselves as being involved in sales. Because Carmen relied on Siebel to supervise Desk Salespeople's involvement in sales, Desk Salespeople only needed field salespeople's permission to put their names in Siebel's sales records. Desk Salespeople had to develop tactics to earn their field sales team's permission to put their name on their team's sales records on Siebel. One was to take on all the tasks that had to be completed after the customer signed an order form. These tasks including filling service requisition forms, reporting the sale in

Siebel, and arranging for the delivery and installation of equipment at the customer’s premises. The other way in which Desk Salespeople were able to report sales on Siebel without actually making any sales was by reporting themselves as responsible for unclaimed revenue, such as a company’s phone bills. Desk Salespeople’s needed the approval of their field sales teams to do this. To win that approval, Desk Salespeople took over the more menial aspects of field salespeople’s job. These tasks mostly consisted of handling customer service issues, such as equipment faults and billing errors. On occasion, Desk Salespeople acted as their field sales managers’ personal assistant, booking hotels and parking places, filling expense reports and correcting errors in Siebel.

These two tactics ensured that Desk Salespeople not only met their targets but also earned Carmen’s “who wants to be a millionaire” award multiple times. All but four Desk Salespeople hit their one million sales target for the quarter. Table 4.1. highlights the extent to which Desk Salespeople were able to report sales in Siebel well above their targets. This table shows that, with the exception of Desk Sales Team Retail 4, every team had an average revenue per sale higher than their 100,000-dollar target for the whole quarter.

Table 4.1. – Average revenue per sale Desk Salespeople reported in Siebel during Carmen’s tenure as a General Manager, in thousands of dollars (target for the quarter was 100 000 dollars).

Desk Sales Team	Aug. 02	Sep. 02	Oct. 02	Nov. 02
Finance 1	241.95	192.45	530.69	1921.73
Finance 2	N/A	55.73	263.61	236.91
Retail 1	278.17	385.01	74.94	645.16
Retail 2	N/A	163.61	105.84	473.18
Retail 3	156.96	297.63	163.51	333.32
Retail 4	N/A	61.18	97.35	88.85
Technology and Media 1	306.22	357.84	215.05	366.89
Technology and Media 2	N/A	101.50	395.39	824.50

Desk Salespeople paid much less attention to the saleswork targets. Their daily talk time and number of calls did not enter their bonus and were not enforced by their General Manager. As Tables 4.2. and 4.3. below show, every Desk Sales Team consistently lagged behind their targets for talk time and for number of calls during the whole time of Carmen’s tenure as DeskSales General Manager.

Table 4.2. – Difference between the number of calls Desk Salespeople had to make per month and their actual calls per month, aggregated by Desk Sales Team, in number of calls.

Desk Sales Team	Aug. 02	Oct. 02	Nov. 02
Finance 1	-4640	-6649	-654
Finance 2	N/A	-6157	-993
Retail 1	-4850	-2770	1970
Retail 2	N/A	-4269	988
Retail 3	-3457	-1632	2704
Retail 4	N/A	-3793	575
Technology and Media 1	-5501	-3284	-476
Technology and Media 2	N/A	-4084	-680

Table 4.3. – Difference between the time of calls Desk Salespeople had to spend on the phone per month and their actual time spend on the phone per month, aggregated by Desk Sales Team, in hours.

Desk Sales Team	Aug. 02	Oct. 02	Nov. 02
Finance 1	-635	-794	-409
Finance 2	N/A	-689	-353
Retail 1	-540	-486	-174
Retail 2	N/A	-549	-163
Retail 3	-457	-391	-88
Retail 4	N/A	-497	-187
Technology and Media 1	-650	-447	-222
Technology and Media 2	N/A	-457	-240

The improvisational pull under Carmen’s leadership was driven by Desk Salespeople’s lack of sales skill and lack of sales training. This improvisational pull was strengthened by the difficult relationships between Desk Salespeople and field salespeople, but it was relaxed by

Desk Salespeople's ability to use Siebel create a representation of engaging in sales without actually doing so.

Addressing the first-line manager dilemma under Carmen's leadership

Carmen's management practices seemed to provide Desk Sales Managers with an easy experience of the first-line manager's dilemma. Carmen pushed "stretch" targets for sales and saleswork, but she only supervised the reported achievement of those targets in Siebel. She did not enforce them. Carmen did reward good performance in sales but did not punish poor performance. Desk Salespeople overachieved their sales targets. They lagged behind their saleswork targets, but these were not used to reward or evaluate either Desk Salespeople or Desk Sales Managers. This easy experience of the first-line manager's dilemma for Desk Sales Managers was, however, only apparent. Desk Salespeople had no real role in the sales in which they reported to be involved. Carmen however, wanted to use Desk Salespeople's sales to prove DeskSales value to E-Tel's sales organization. Carmen wanted to know the details of Desk Salespeople's role in these sales. She wanted to post vignettes of Desk Salespeople sales and saleswork on DeskSales' website to promote the unit to the rest of E-Tel. This created a challenge for Desk Sales Managers. When reporting large sales to Carmen, Desk Sales Managers needed to explain the role that each Desk Salesperson played in each reported sale. A conversation between two Desk Salespeople highlights the prevalence of trading involvement in sales for menial work and the challenge that this created for Desk Sales Managers. Larry and Michael, two Desk Salespeople on one of the retail teams discussed their team's top sales over breakfast. Larry said that Joe, another Desk Salesman on their team, had a 15-million dollar sale under his name in Siebel with 95% probability. "Do you want to know what he did for it?" Larry

asked. Michael nodded and Larry made a zero with his fingers, grinning. Larry told Michael that "Joe is trying to see what he can do for his field [salesperson], he is thinking of saying that he'll be tracking the revenue on ARTS [E-Tel's *automatic* revenue tracking system]." Michael asked Larry how much of the revenue he brought in was actually closed by him. Larry said that he had around 5.8 million dollars under his name and that he had probably closed, at the most six hundred thousand in orders passed to him by his field sales team. We laughed a lot about that. Larry concluded the conversation by saying that "Andrew [his Desk Sales Manager] makes up a bullshit story to Carmen every time! He came around yesterday and asked me to make sure that I called [my field salesman] to find out what it [the sale] was about and make sure that I put myself in the notes [in Siebel explaining what Larry did to be involved in the sale]." Desk Sales Managers thus had to help Desk Salespeople come up with narratives that represented their involvement in sales as resulting from valuable work.

Desk Sales Managers, however, did not prevent their Desk Salespeople from reporting involvement in large sales. Instead, they improvised their own symbolic rewards for Desk Salespeople's reporting work. If their Desk Salespeople were the ones reporting being involved in the largest sales in the unit, Desk Sales Managers would be invited to attend corporate functions at E-Tel's headquarters where Desk Sales Managers had the opportunity to interact with the company's senior managers and further their own career prospects. Andrew, one of the Desk Sales Managers that first joined DeskSales, rewarded the Desk Salesperson that was involved in the largest sale any of his team members reported in Siebel with a plastic Oscar figurine he named the "Golden Salesman." The Desk Salesperson who was awarded the "Golden Salesman" for that week placed it on the top of the drawer box in her or his desk, so that it was visible from the whole unit (see Exhibit 4.2.).

Exhibit 4.2. – The “Golden Salesman” on a Desk Salesperson’s drawer box.



Desk Salespeople expressed less enthusiasm when they received the “Golden Salesman” than when they received the five hundred dollars in shopping vouchers that Carmen used to reward sales of one million dollars in revenue or more. However, some Desk Salespeople on the team did report receiving this award on their résumés. Larry, a Desk Salesman in Andrew’s

team, included a picture of himself with the “Golden Salesman” on his desk when applying for a field salesperson position.

Desk Sales Managers also drew on verbal recognition to reward Desk Salespeople’s accomplishments towards meeting their sales target. The way Josh, the Desk Sales Manager in one of the Technology and Media teams, praised his Desk Salespeople in a team meeting highlights how verbal recognition was used to reward Desk Salespeople. After allowing his Desk Salespeople to share with each other their reported sales in the previous week, Josh held a printout of a slide with a bar graph. It was a graph of the ten highest sales in Siebel. He said that seven of the top ten sales in Siebel were owned by his team. He said that "Christian [one of E-Tel’s top managers] recognizes that it is from you guys that the next crop of team leaders and sales managers is going to come.” Josh added, "Christian is asking about everybody individually and that he's not doing that for the other teams.” He continued, "you're always in the spotlight and that's good.” Josh finished: "he also talks about you to the top team,” "so well done.”

Desk Sales Managers, much like their Desk Salespeople, paid less attention to saleswork targets than they did to sales targets. Desk sales managers had to meet two types of saleswork targets. One type of saleswork target was their own responsibility. Desk Sales Managers had to keep a demanding training schedule. Their target was to have twenty five training sessions a week with their Desk Salespeople. Desk Sales Managers rarely engaged in training. Instead they either had their Desk Salespeople sign blank training forms that Desk Sales Managers would then fill out in bulk or they had Desk Salespeople fill and sign the training forms themselves. On occasion, the same Desk Salesperson would fill training forms for more than one Desk Sales Manager. After filling thirty-one training forms for two Desk Sales Managers, Frank, a Desk Salesperson in one of the Finance Desk Sales Teams, complained that Desk Sales Managers did

not like to do training forms and that they filled them out just because they had to. He showed the forms he was completing and highlighted how vague the information he was putting in the forms was. “Sales training” and “Siebel training” were two examples. When asked what the purpose of these forms was, Frank replied, “I ask myself that same question.” He laughed and went back to fill out more training forms.

The other saleswork target that Desk Sales Managers had to meet was their Desk Sales Team’s phone usage target. Each Desk Salesperson on each team had to talk to 30 people a day for a total of 3 hours of talk-time. Desk Sales Managers helped Desk Salespeople to find ways of meeting their talk-time target but did not systematically supervise if Desk Salespeople did so. Desk Sales Managers told Desk Salespeople about recorded conferences given by E-Tel’s top managers that Desk Salespeople could listen to with the purpose of increasing their time on the phone. Only a few Desk Salespeople bothered to listen to these calls and consequently sales teams were consistently below their saleswork targets. However, this was of no practical consequence because Desk Sales’ General Manager did not enforce saleswork targets and Desk Salespeople’s bonus was not contingent on meeting these targets.

In a nutshell, Desk Sales Managers addressed their experience of the first-line manager’s dilemma under Carmen’s leadership by managing their Desk Salespeople’s representation work instead of managing their sales and saleswork. Desk Sales Managers rewarded the use of Siebel to represent involvement in large sales. Desk Sales Managers created narratives that proved the value of their Desk Salespeople’s involvement in these sales to create an image of competence and success. All the menial tasks that Desk Salespeople had to do to earn the right to list themselves as involved in the large sales made by their field sales teams was invisible and unimportant to their Desk Sales Managers.

THE DESK SALES MANAGER DILEMMA UNDER MARIAH

Mariah enforced a more demanding set of sales and saleswork targets than Carmen, strengthening the bureaucratic push over Desk Sales Managers to much more challenging levels. Nonetheless, Mariah followed Carmen in relying on information technology to supervise compliance with these targets. The incentives that Mariah attached to sales and saleswork targets had a much narrower appeal than Carmen's lump sum incentive. Because of this, Desk Salespeople's motivational profiles played a much more central role in determining the amount of representation work they were willing to engage in, strengthening the improvisational pull over Desk Sales Managers. Desk Sales Managers improvised a set of practices to actively manage their Desk Salespeople's representation work which they enacted during their team's audio-call meetings. The specific details – explained below – of these strengthened forms of the bureaucratic push and the improvisational pull and the practices that Desk Sales Managers enacted to deal with the tension these two forces created over them point to the core dynamics behind the façade-creation pattern that emerged in the analysis of the first-line manager's dilemma under Carmen.

Bureaucratic push

While Carmen was leading DeskSales through its first few months of activity, E-Tel Retail was buzzing with backstage political ploys. The meetings of the MCMP team responsible for implementing DeskSales, whose purpose now was to advise Carmen as DeskSales General Manager were spent not reviewing the unit's performance, but discussing the impending changes in E-Tel Retail's management ranks. In late November 2002, Desk Salespeople received an

email message from the newly appointed head of E-Tel Retail introducing himself and announcing that a number of changes in the division's management ranks. One of those changes was the naming on Mariah as the General Manager of DeskSales.

Mariah joined the unit in December 2002 after Carmen stepped down, on the fifth month of the unit's life. DeskSales was not yet half way through its first year, the unit had yet to prove its value as a member of E-Tel's sales organization. Consequently, and much like Carmen, Mariah saw her role as that of promoting DeskSales to the rest of the company. Reflecting on her first year at DeskSales, Mariah explained her role by saying: "I am the one who sells their [Desk Salespeople's] effort. I am the salesperson for the desk role." Mariah followed Carmen's tactic to showcase the unit's value to E-Tel's sales organization. Like Carmen, she also took on a "stretch" sales target for the unit. However, Mariah went beyond Carmen's ambitions. She not only took on a larger revenue target than the one originally handed down by E-Tel's senior managers, but she also committed to achieve it in eight months instead of the normal 12-month sales year.

Mariah's stretch target far exceeded the initial sales target that E-Tel's senior managers assigned to the unit. In an all-hands call with all the Desk Salespeople and Desk Sales Managers at Desk Sales at the end of Mariah's first year at DeskSales, George, the senior E-Tel manager who answered to the company's CEO for DeskSales' performance, explained how Mariah had successfully taken on this "stretch" target. George started by saying that he wanted to thank Mariah for "The great leadership that [she] has performed so far" and added that she "would be a very tough act to follow." He mentioned that the target for the year he gave to Mariah was 330 million dollars of new revenue. George then went onto to say that Mariah and he had a meeting where she agreed to a super-stretch target. George said that he wrote the figure down and put it

into a sealed envelope and gave it to one of his aides to keep until the end of the sales year. George then said that he had been told that everybody had made a great effort to deliver on these targets. Then came the drum roll as they announced the figure that DeskSales hit for the year. The figure was 363.8 million dollars, which was far in excess of the “super-stretch target” of 350 million dollars that had been sealed in the envelope. This came at a time when the rest of E-Tel was contending with low or flat revenues due to competition and product substitution. During her first year at DeskSales, Mariah had not only promised but also delivered a very ambitious sales target.

Mariah’s sales target for DeskSales was also a “stretch” target because Mariah ordered Desk Sales Managers to hit their yearly target in eight not twelve months, increasing pressure on Desk Sales Managers. After a conversation with Ferdinand, her Desk Sales Manager, Nancy, a Deputy Desk Sales Manager, reported that Ferdinand complained that Mariah had told Desk Sales Managers that “if they needed twelve months to hit their target, they would be out of a job.” In a meeting with his whole team, Ferdinand explained that the reason the unit needed to hit its sales target in eight months was related to customers’ paying practices. Ferdinand said that DeskSales’ performance was only measured by the revenue received during a sales year. Because E-Tel’s products are billed through quarterly fees, there was a step-down loss in revenue throughout the sales year. This meant that a product sold in the first quarter of the 2002/2003 sales year would only generate three quarters of its revenue that year and one quarter in the 2003/2004 sales year. A product sold in the last quarter of the 2002/2003 sales year would only generate revenue in the 2003/2004 sales year. Consequently, all sales made in the last quarter of a sales year would not count towards that year’s target.

These two ways of stretching Desk Salespeople's targets – increasing their value and reducing the time available to reach them – strengthened the bureaucratic push over Desk Sales Managers. This push was also strengthened by qualitative challenges in Desk Salespeople's sales targets. Instead of having an overall sales target, Desk Salespeople now had to reach two different types of sales targets. One was a target for “created and owned” sales. “Created and owned sales” were sales initiated and closed by a Desk Salesperson. Mariah defined these as sales opportunities that were discovered by Desk Salespeople in the course of their everyday interaction with customers and whose value and product complexity were low enough for Desk Salespeople to handle. Desk Salespeople's target for “created and owned” sales was 350,000 dollars a year. The other sales target that Desk Salespeople had to reach was a target for involved sales. Involved sales were sales either initiated or closed by Desk Salespeople, but not both. Sales created but not closed by Desk Salespeople were labeled ‘lead-generation’. Mariah defined these as sales opportunities that Desk Salespeople discovered in the course of their everyday interaction with customers but that Desk Salespeople were not qualified to handle, either because of the volume of the sale or because of the complexity of the products involved. Sales closed but not created by Desk Salespeople were labeled ‘channel-driving’. Mariah defined these as sales opportunities that field account managers had discovered in the course of their everyday relationship with customers but that field account managers did not close because of their low value. Desk Salespeople had much smaller targets than field account managers and thus they were more motivated to close these smaller sales. If Desk Salespeople met their 200,000 dollars target for involved sales, Mariah could show that the unit's value to E-Tel rested not only on DeskSales ability to sell independently, but also on its ability to assist field account teams in selling.

Mariah's target and bonus plan also strengthened the bureaucratic push over Desk Sales Managers because of the strain they placed on Desk Salespeople's relationship with their field salespeople. With Carmen, Desk Salespeople only had to persuade their field sales teams to let them put their names in the sale's record in Siebel. Now Desk Salespeople had to persuade field sales teams to let them claim sole responsibility for a total of 350,000 dollars of new revenue from sales reported in Siebel. Also, Desk Salespeople had to persuade field sales teams to let them claim responsibility for either finding or closing 200,000 dollars of new revenue from sales reported in Siebel. Even those Desk Salespeople who had good relationships with their field sales teams were disenchanted with the changes that Mariah made to their performance measurement and to their bonus plan. The way Nigel, a Desk Salesman in one of the Retail teams, reacted to the news of Mariah's changes to his bonus plan, highlights the difficulty that Desk Salespeople felt in meeting their new targets for reported sales in Siebel. Nigel got a phonecall from a field specialist regarding a couple of open sales worth 700,000 dollars in revenue. After he hung up, he told Dennis [another Desk Salesman on Nigel's Desk Sales Team] that this was a call with the field specialist who was going to be involved in the deal but Nigel would 'create and own it'. Dennis told Nigel that this did not count as a "created and owned" sale because the field specialist who had his name in the sale's record was external to DeskSales. Nigel did not know this rule. This was announced by Mariah in the unit's start-of-the-year meeting, and Nigel had not been there. Nina, Nigel's Desk Sales Manager actually emphasized this on this morning's audio-call but Nigel did not hear it because he was attending Siebel training. Nigel was "flabbergasted," "I don't know how I'm going to hit my targets now, I'll have to explain [to my field account team] that on top of all the requirements, 'created and owned' sales cannot involve anyone outside DeskSales." Nigel complained, "I am really depressed. I'd

rather not have received the email allowing me to report this sale [as my own] in the first place – now, the only thing I'm doing is putting the opportunity [i.e., entering it in Siebel, without it counting towards Nigel's sales targets] instead of [my field sales team], that's it."

In addition to these two sales targets, there were also three saleswork targets that each Desk Sales Team had to meet. All of the team's Desk Salespeople had to report making seven calls to customers each day; all of the sales that Desk Salespeople reported in Siebel had to have a complete salesplan; and no Desk Salesperson could have errors in their sales records in Siebel. These saleswork targets allowed DeskSales' General Manager to showcase the unit's efforts in addition to its results. These two additional set of targets for sales and saleswork added pressure to Desk Sales Managers. They not only had to ensure that their Desk Salespeople met stretch sales targets, they also had to make sure that their Desk Salespeople reached both their "created and owned" and their "involved" sales targets and to make sure that Desk Salespeople reported the types and amounts of saleswork prescribed by Mariah, their General Manager.

Mariah supervised, rewarded and enforced Desk Salespeople's progress towards reaching their sales and saleswork targets. Anthony, one of the Desk Sales Managers in one of the retail teams, described Mariah as the "Demonic Mistress of Siebel" because of her focus on enforcing reported sales and reported saleswork in Siebel. Mariah relied exclusively on Siebel to supervise Desk Salespeople's sales and saleswork. Mariah reported that Siebel made her job "much easier," not only because she could use it to see Desk Salespeople's progress towards their targets but also because it allowed her to make DeskSales performance "transparent" to upper-level management and to E-Tel's field sales force: "if you don't have a shared system, people will just think that you're making up the numbers – with a shared system it's totally transparent."

Mariah used Siebel to de-personalize her supervision of Desk Sales Teams. Whereas Carmen relied on Desk Sales Managers' justifications as proof of involvement, Mariah set Siebel-level criteria to classify sales as "created and owned" and "involved." During Carmen's tenure, Desk Salespeople could achieve their sales target just by reporting their involvement in field salespeople's sales. For Carmen, a plausible account of Desk Salespeople's role in a sale was sufficient proof of involvement. During Mariah's tenure as General Manager, Desk Salespeople had targets for sales that they carried out on their own and targets for sales that they carried out with the help of their field sales team. The definition of which sales counted towards each of these targets was very precise. For a sale to count as "created and owned" – a sale carried out by Desk Salespeople on their own – Desk Salespeople had to both create and close the sale's record in Siebel. For a sale to count as "involved" – a sale carried out by Desk Salespeople in cooperation with their field sales team – Desk Salespeople had to either create or close the sale's record in Siebel. Creating a sales record in Siebel was thus a proxy for the act of finding an opportunity to sell to a customer. When created, a sale's record was a representation of a customer's initial interest in addressing a technology-related need. Closing a sale's record in Siebel represented successfully persuading the customer to buy a product or service from E-Tel to meet that need.

Mariah not only supervised Desk Salespeople's progress towards their sales targets but also their progress towards their saleswork targets. Mariah implemented a set of fine-grained measures of saleswork based on Siebel. Desk Salespeople now had to use Siebel to log calls to their customers. In addition, Mariah supervised Desk Salespeople's use of Siebel's sales plans and Desk Salespeople's thoroughness in reporting sales in Siebel. Mariah frequently emailed "sinners' lists" to Desk Salespeople and Desk Sales Managers. "Sinners' lists" were outputs from

Siebel which showed records with missing and erroneous information that had to be corrected by the Desk Salesperson who was assigned the accounts to which those records belonged. These lists were attached to email messages with instructions to fill in or correct these data.

Mariah did not use Siebel to report automatically the sales and saleswork that Desk Salespeople logged in the system. Instead she had her Desk Sales Managers prepare these reports – a task that occupied most of Desk Sales Managers’ time at work. There were two reasons for this. The first is that creating these reports was an opportunity for compliance. Desk Salespeople rarely reported enough calls to customers to meet their saleswork targets for each week. When Desk Sales Managers were creating their team’s weekly report, they had the opportunity to ask their Desk Salespeople to report enough calls to customers to hit those saleswork targets. The second reason to have Desk Sales Managers do these reports themselves was that there were just too many possible exceptions on reported sales for these to be able to be automatically reported by Siebel. Field salespeople occasionally included their name in their Desk Salespeople reported sales in Siebel. This classified these sales as “involved,” instead of as “created and owned,” crippling DeskSales ability to demonstrate its role as a revenue-generating addition to E-Tel’s sales force (and reducing Desk Salespeople’s and Desk Sales Managers’ bonus). Additionally, creating these reports manually allowed Desk Sales Managers to have their Desk Salespeople change the close date of sales records in Siebel so that, for example, if a Desk Saleswoman had hit her sales target for any given week, she could report sales in excess of that target in the next week so as to also meet her targets then. All of this effort to use Siebel’s weekly reports to create a representation of compliance for every Desk Salesperson in their team occupied the majority of Desk Sales Managers time at work. This was not only because these reports took a long time to prepare but also because Mariah often asked for ad-hoc reports on specific activities (such as the

sales of a specific product) and because Desk Sales Managers had to present and justify their reported sales and saleswork figures in a number of scheduled weekly calls with multiple upper-level managers. When asked to reflect on the negative elements of her job as a Desk Sales Manager, Linda complained:

One of the major problems we have had at DeskSales is that we need to keep proving ourselves and one of the main problems is that we have to keep producing statistics and spreadsheets and things like that and for me personally as a Desk Sales Manager, having to produce these things to feed them up so that [our General Manager] can justify what we're doing and when we're doing it, so that [top managers] and especially [senior managers] are happy. So it takes a lot of time and it's unproductive work as well because it doesn't help you make more sales, it's just looking back, so that justification process is quite frustrating.

Even Desk Sales Managers and Deputy Desk Sales Managers who were very proficient with Siebel had to invest most of their time preparing reports. A conversation between David, a Desk Sales Manager, and Ronald, his Deputy Desk Sales Manager, highlights the burden that reporting was for Desk Sales Managers and their deputies. David and Ronald, both of whom were very proficient with Siebel, often complained about the amount of time they had to dedicate to producing reports. When having breakfast together, on the first week of the second sales quarter of 2003 (a time when there was little if any pressure to report sales figures), David asked Ronald if Ronald could still stay later on Wednesday, and Ronald said that he could but complained that the "operations team should be the one doing this!"⁷ David said that he had gotten an email from Mariah, their General Manager, sent to all Desk Sales Managers saying that she appreciated that they had been putting a lot of extra hours in because of reporting and that going forward the operations team would take a much more active role in helping them on that⁸. Ronald said that all the reporting he has to do did not really leave him time for anything else. He said, "I really should be spending my time doing coaching, that's really what the job is." David

⁷ DeskSales had a 10-person operations team whose members did most of the IT-related work in the unit, such as setting up email accounts, managing Siebel software upgrades and processing requests for clearance to access customer information systems.

⁸ In spite of this promise, Desk Sales Managers and Deputy Desk Sales Managers were responsible for monthly reporting until I left DeskSales four months after this conversation.

said that doing coaching full time "is something you should strive for, not something you need to be doing." He added, "if you did it people would think that you had too much time on your hands and they would give you some more work to do." Ronald agreed but retorted that "in our interviews for Deputy Desk Sales Managers they emphasized the coaching part, it was like 50% of the interview, but on the job you don't even do 1% of it!"

Mariah's use of reporting shaped Desk Sales Managers' experience of the First-line manager's Dilemma in three ways. First it added a set of reporting tasks to Desk Sales Managers' everyday work, reducing the amount of time they had available to manage and supervise their Desk Salespeople. Second it added to the bureaucratic push: Desk Sales Managers not only had to make sure that their Desk Salespeople engaged in the sales and saleswork need to meet their targets, but also that their Desk Salespeople reported those sales and that saleswork on Siebel. Finally, it sharpened the challenge created by the bureaucratic push: strictly speaking, Desk Sales Managers had to enforce the representation of sales and saleswork on Siebel, rather than the actual execution of sales and saleswork.

Mariah designed Desk Salespeople's bonus plan to motivate Desk Salespeople to report sales and saleswork and reward them for doing so. Her four-element bonus plan attempted to shape Desk Salespeople's sales and saleswork at a more fine-grained level. The first element of Mariah's bonus plan was meant to create a sense of shared fate with the account team. As with Carmen's bonus plan, this element of Desk Salespeople's bonus was paid if the total sales for their accounts matched a revenue target set by E-Tel's senior management. Under Mariah's bonus plan, however, this element was only worth 20% of Desk Salespeople's bonus.

The second element of Mariah's bonus plan rewarded Desk Salespeople's individual sales. This part of Desk Salespeople's bonus was paid if the sales that Desk Salespeople reported

on Siebel as the exclusive outcome of their own saleswork matched a sales target set by DeskSales' General Manager. Specifically, achievement towards this target was measured by adding the revenue from sales records in Siebel opened and closed by Desk Salespeople. This element was worth 40% of Desk Salespeople's total bonus.

The third element of Mariah's bonus plan meant to reward joint sales with the account team. This part of the bonus was awarded if the sales that Desk Salespeople reported on Siebel as an outcome of joint saleswork with field account managers matched a target set by DeskSales' General Manager. Specifically, achievement towards this target was measured by adding the revenue from sales records in Siebel either opened or closed by Desk Salespeople. This was worth 20% of Desk Salespeople's total bonus.

The fourth element of Mariah's bonus scheme was meant to reward, at the same time, customer satisfaction and Siebel use. Desk Salespeople earned this part of their bonus if two conditions were met. First, E-Tel's customer satisfaction index had to meet a customer satisfaction target set by E-Tel's CEO. Secondly, Desk Salespeople had to meet weekly targets for Siebel usage. Desk Salespeople had to log 35 customer calls a week, have a sales plan for every single open sales record in Siebel and have no errors in their closed sales records. This was worth 20% of Desk Salespeople's total bonus.

Mariah did not make any changes to the bonus plan that Carmen had designed for Desk Sales Managers. Desk Sales Managers could earn as much as 50% of their salary in bonus, as long as each of their Desk Salespeople met their sales and saleswork targets.

Mariah actively used her bonus plan to manage Desk Salespeople. When DeskSales as a whole or a specific team consistently underperformed on their reported sales and saleswork, Mariah promptly warned them of their lagging performance, highlighting its consequences on

their bonus. The first time that the unit as a whole lagged behind their saleswork reporting targets, Mariah sent an email to all the Desk Salespeople, Desk Sales Managers and Senior Desk Sales Managers warning everyone of the consequences for their bonus of a failure to hit their reporting targets and demanding action from Senior Desk Sales Managers:

> -----Original Message-----
> From: Johnson,T,Mariah,ETDS
> Sent: 13 March 2003 14:17
> To: DESKSALES - ALL
> Subject: Reporting
>
>
> All,
>
> I am far from impressed with the stats attached below. We are meant to do
> 35 customer calls per week per Desk Salesperson. That is a mere 7 a day per
> person. This
> is hardly tough going, and this is a serious issue for us as a unit. We
> can only sell when we are talking to customers, it does not happen by
> accident.
>
> Simon - please resolve for Retail
> Ryan - please resolve for Finance
> Marie / Tom - although you guys have done better than the average,
> this is still NOT good enough - please resolve and report back to me.
>
> I do not want to hear any moans about not logged - that is your issue in
> terms of sales mgt discipline - this will AFFECT your bonus
> have no fear.
>
> Mariah
>
> Figures for April to date for outbound customer calls on Siebel
> are (average per week per Desk Salesperson):
>
> Retail: 9.9
> Technology and Media: 16.7
> Finance: 8.3

Mariah also enforced a strict use of the bonus plan to calculate Desk Salespeople's bonus.

Ferdinand, a Desk Sales Manager on one of the finance teams explained why Mariah had to rely on Desk Sales Managers to calculate bonus:

Because [of] the way the [bonus] is worked out, there is really no one kind of query that you can run [on Siebel] to pull it off [i.e., calculate Desk Salespeople's bonus]. You need a local level of knowledge to pull it off. So Siebel is not ideal and at the same time there are problems with Siebel itself because [Carmen and Senior Desk Sales Managers] are worried about missing sales or missing sales that haven't been claimed correctly, so the whole problem is about Siebel

This complex, non automated process to calculate bonuses led to frequent mistakes. Kevin, a Desk Sales Manager on one of the Retail teams complained, “the guy who is the best salesperson [in Kevin’s team] knows how he is doing on all the statistics by heart and he calculates his bonus every month and he has never, not even once, got the bonus he's entitled to; when he gets 80% of it, it's a victory, and that's sad.”

Desk Salespeople put pressure on their Desk Sales Manager to address these errors by submitting “exception reports.” This reduced the time that Desk Sales Managers had available to supervise their team’s sales and saleswork. Michelle’s reaction to a lower-than-expected bonus illustrates the pressure that Desk Salespeople could put on their Desk Sales Manager. Michelle, a Desk Saleswoman on one of the Finance teams, complained to Tara, the Desk Saleswoman that sat across from her, that she was not happy at all with her bonus. Michelle said that she had used the "bonus calculator" spreadsheet that their Deputy Desk Sales Manager had sent around and that she found out that she had got 600 dollars less than what she should have gotten. She said that she was supposed to have closed a sale but that, because she was away on holiday, it was her field account manager who closed it and so it didn't count towards her target. This lost opportunity, worth 200,000 dollars, caused Michelle to lose so much money. She said that the situation was easy to solve. Her Desk Sales Manager just had to submit an exception report. She said that she started actually working on that report herself but that her Desk Sales Manager had told her that it was not adequately done. Michelle said that she asked him how she could do it better, but her Desk Sales Manager said that he had no time to help her. Michelle was not happy about this and said that she would keep complaining until she got her missing 600 dollars.

Mariah not only made changes in the way the bonus was calculated but also in the way it was reported to Desk Salespeople. This change diluted the bonus plan’s effectiveness in

motivating Desk Salespeople to hit their targets. Desk Salespeople such as Roy and Todd found this new bonus report confusing and hard to understand. Upon seeing his first bonus statement after Mariah took on Desk Sales General Manager role, Roy complained that “you need a PhD to understand this.” Todd, who sat across from Roy, compared this bonus statement with the one he received when Carmen was the DeskSales General Manager:

Remember what we used to get [before], [a] page with what you sold and the bonus you earned. You need a degree in rocket science to be able to understand this – [it's] far more complicated than I expected.

The way their bonus was presented together with the complex way in which it was calculated left Desk Salespeople confused about what to do to maximize their bonus. This led Desk Salespeople to develop their own interpretations of the bonus plan. Desk Salespeople held to these interpretations even when their Desk Sales Managers told them they were wrong. That was the situation that Tony, a Desk Sales Manager on one of the Technology and Media teams faced when trying to address a conflict between Marcia and Patricia – two of the Desk Salespeople on his team. Marcia and Patricia were having a mild argument because Patricia had logged a sale on Siebel but she was taking a long time to complete the order forms for it. Marcia offered to do the order forms but she wanted Patricia to hand over the sale to her (Marcia) so that she also got credit for it. Patricia said that if she did so she would lose the credit for the sale. Marcia replied that if Patricia created the sale's record and Marcia closed it, then they would both get credit for it on their “involved” target. Patricia said that even if she closed the sale herself, it would only count towards her “involved” target because there was already a specialist on the sale's record in Siebel. She was just not sure that she would get credit for it if she handed the sale to Marcia. Marcia called Tony, their Desk Sales Manager. Tony came by and after Marcia explained the situation to him, Tony told Patricia that if she passed the sale to Marcia, they would both get credit for an “involved” sale. Patricia replied, "I don't believe that." Tony

explained that he was the one running the report to calculate the bonus and that he knew that it was like that. Patricia said that, "that may work for reports, but I don't believe it's like that for the actual bonus." Tony replied that he was sure it was and Patricia retorted, "I want to see that before we do it." Tony said that it was not possible to see it before and Patricia said that she had handed off an opportunity before and that it had disappeared from her Siebel records. Tony explained that it disappeared from her created and owned sales but not from her involved sales. "I don't believe it works like that [for the bonus]," she quickly added "it's not because of you Marcia, it's because of how the system works." Tony said that if Patricia wanted to do the order forms herself, she could keep the opportunity to herself and Patricia said that she preferred doing that.

In addition to the bonus plan, Mariah introduced what she called an "incentive system." The "incentive system" was meant to reward reported sales and saleswork in Siebel with prizes. Desk Salespeople earned points in the "incentive system" for each sale they reported in Siebel. The higher the revenue of the sale the higher the number of points Desk Salespeople made. Desk Salespeople could also lose points by failing to hit each of their saleswork targets, namely their target for reported calls to customers, their target to have a salesplan for every sale's record and their target to have no errors in their Siebel sales records. The two Desk Salespeople with the highest number of points would earn a prize. The Desk Salesperson with the highest number of points could get prizes such as a car or travel vouchers to exotic destinations. The Desk Salesperson with the second highest number of points could get a number of home appliances and high-end consumer electronics. The Desk Sales Manager whose team achieved the highest number of points at the end of the year earned a safari to Kenya and the whole team would get an all-expenses paid trip to Paris for a weekend.

Mariah also made an adjustment to the bonus plan after it was implemented. Instead of changing any of its elements – which was forbidden by E-Tel’s agreement with the union that represented Desk Salespeople – she changed the way some of these elements were calculated. Mariah promised that Desk Salespeople would not have to share their revenue with field account teams. Instead, she promised to adopt a “double-bubble” policy. Under this policy, Desk Salespeople and field salespeople would both earn the total bonus for sales that Desk Salespeople “created and owned” and sales in which Desk Salespeople were “involved.” However, Mariah kept the specific details of her “double-bubble” policy ambiguous to Desk Salespeople’s chagrin. In one of their team’s morning audio calls, Jeffrey, a Desk Salesman on one of the Retail teams, asked Anthony, his sales manager, to explain the “double-bubble” policy. Anthony said that he had his own understanding of “double-bubble,” but that there were other views from management, which could include their bonus being capped and other changes that would save DeskSales money. People became very upset. Jeffrey spat, "this is all a pile of crap! Now [management is] measuring the number of times [we] go to the toilet each day!"

It is thus not surprising to find that Desk Sales Managers saw the unit’s bonus plan as a barrier to achieving their targets. Linda, a Desk Sales Manager on one of the Customer Products teams explained:

The [bonus plan] is not driving the right behaviors. [...] We get penalized on so many things so you have to keep looking at stuff for nothing. And if someone else creates it and you work on it you get nothing for that, so there’s a lot of conflict internally so we’re not actually using the right behaviors on the bonus plan.

Thus the bonus plan not only did not help Desk Sales Managers to hit their targets, it also increased the improvisational pull that Desk Sales Managers were subjected to. The way Mariah designed and used her bonus plan detached it from Desk Salespeople’s sales and saleswork performance, tying it only to their reporting. Desk Sales Managers also had to adapt this bonus

plan to the local conditions of their teams to ensure that their Desk Salespeople's efforts were rewarded.

To summarize, the bureaucratic push under Mariah was driven by a "stretch" sales target that had Desk Salespeople achieve more revenue than E-Tel upper-level managers required, and in less time. This push was strengthened by the increased amount of reporting work that Desk Sales Managers and Desk Salespeople had to do and by the confusing and changing nature of Mariah's bonus plan. The bureaucratic push over Desk Sales Managers was partially alleviated because Mariah's targets were focused on the act of reporting sales and saleswork, not on that of carrying these out.

Improvisational pull

Mariah's policies and the way they were interpreted and used by Desk Salespeople strengthened the improvisational pull over Desk Sales Managers. Mariah's recruitment policy kept DeskSales staffed with Desk Salespeople with little, if any sales experience. Mariah hired exclusively from temporary staffing agencies, which supplied DeskSales with people who had limited work experience and that had, at best, a high-school education.

Mariah's efforts to enforce sales and saleswork targets deteriorated the quality of incoming Desk Salespeople's training, thus strengthening the improvisational pull over Desk Sales Managers. Mariah enforced saleswork targets based on the number of people allocated to the team, independently of whether they were on training, on sickness leave or on holidays. Desk Salespeople had to report seven calls to customers a day from their first day at DeskSales, even if they were assigned to training for their first whole week at the unit. To address this, Desk Sales Managers did not allow incoming Desk Salespeople to attend all the training sessions planned for

them. Instead, Desk Sales Managers had Desk Salespeople spend as much time as possible at their desk, reporting saleswork in Siebel.

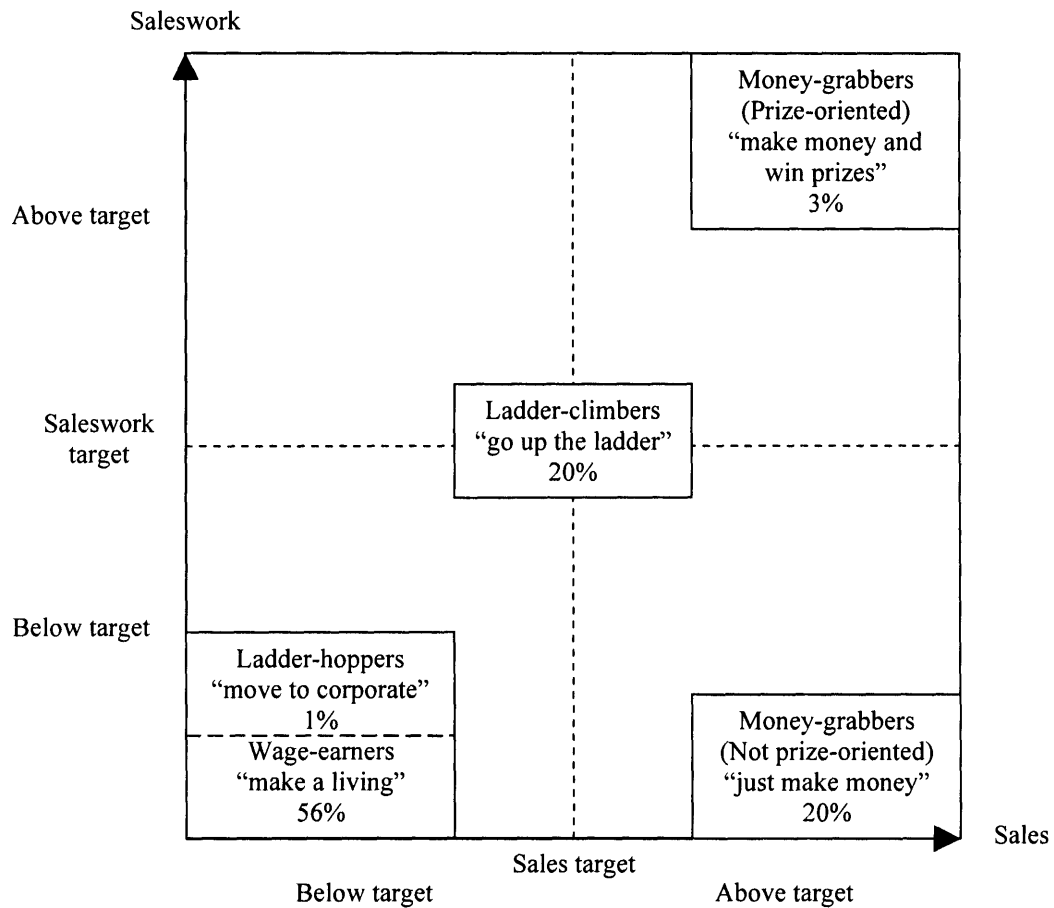
Desk Sales Managers also wanted new Desk Salespeople to spend as much time as possible at their desk to be sure that their Desk Sales Team reached its sales targets. Mariah hired new Desk Salespeople when E-Tel's senior managers decided to allocate more accounts to DeskSales. However, these new accounts were not given to newly-recruited Desk Salespeople. Instead they were allocated to experienced Desk Salespeople. Incoming Desk Salespeople took over the existing accounts that were left vacant when experienced Desk Salespeople moved to new accounts. The field salespeople on these existing accounts depended on their Desk Salesperson to carry a number of menial tasks that field salespeople were neither willing nor able to put on hold until their new Desk Salesperson came out of training. Desk Sales Managers thus demanded that their newly-hired Desk Salespeople spent as much time as possible at their desk working for their field salespeople and thus adding sales revenue to their Desk Sales Team's bottom line.

The improvisational pull over Desk Sales Managers was also strengthened by the way Desk Salespeople drew on their career aspirations and motivations when interpreting and using Mariah's policies to enforce sales and saleswork targets. During Carmen's tenure, Desk Salespeople's career aspirations and motivations only shaped the extent to which Desk Salespeople overachieved their targets. Carmen supervised and rewarded involvement in sales and required only verbal proof to recognize it. It was easier to persuade field salespeople to allow Desk Salespeople to put their name on an existing sale's record in Siebel than to allow a Desk Salesperson to take full or half the credit for a sale in Siebel. Desk Salespeople had to put much more effort into reaching their sales targets under Mariah's target and bonus plan. The tactics

that Desk Salespeople drew on to achieve their sales and saleswork targets depended on their career aspirations and motivations. Desk Salespeople could be classified in four broad types based on these career aspirations and motivations. The Desk Salespeople in each of these types engaged in different levels of sales and saleswork, as summarized in Exhibit 4.3. (percentages are for the proportion of Desk Salespeople in each category).

Ladder-hoppers wanted to join E-Tel's corporate ranks. Their career aspirations were centered on roles such as business development and change management. Ladder-hoppers tried to maximize their interaction with E-Tel's senior managers at the expense of their interaction with customers and field account teams. They were thus consistently behind their targets for sales and saleswork. Ladder-hoppers increased the improvisational pull over Desk Sales Managers because they were less concerned with their sales and saleswork targets than with taking advantage of opportunities to gain the favor of E-Tel's senior managers. Desk Sales Managers could not rely on ladder-hoppers to contribute towards their team's sales and saleswork targets.

Exhibit 4.3. – Distribution of the four types of Desk Salespeople by their level of sales and saleswork (N=75).⁹



Ladder-climbers' goal was to go up the hierarchy one step at a time. There were two paths that ladder-climbers could take. One was to go up DeskSales hierarchy, the other was to use DeskSales as a stepping stone to get a field sales role and then advance within the field sales force. Ladder-climbers consistently hit their sales and saleswork targets, but only just so. They strove to have good relationships with their accounts and they were scrupulous in meeting their reporting targets. Ladder-climbers alleviated the improvisational pull over Desk Sales Managers.

⁹ The classification that grounds this table was based on data from interviews, observations and Desk Salespeople's reported sales and saleswork for the period of January 2003 to July 2003.

They met their sales and saleswork targets and helped other Desk Salespeople on the team to move closer to meeting their own targets. However, ladder-climbers did not over-achieve their targets. In consequence, they did little to allow Desk Sales Managers to showcase their team's performance. Moreover, ladder-climbers stayed in the Desk Salesperson's role for as little as they could. They only alleviated the improvisational pull over their Desk Sales Managers temporarily.

Money-grabbers became Desk Salespeople because of the amount of money that they could make in bonus and because, in some cases, of the prizes they could win with Mariah's "incentive system." Unlike ladder-climbers, money-grabbers were not content with just meeting their targets. Money-grabbers were among the unit's top performers – their reported sales dwarfed those of other Desk Salespeople by a factor of 10. Unlike ladder-climbers, money-grabbers shunned away from reporting saleswork and avoided managerial tasks that took time away from reporting sales on Siebel. Money-grabbers were the Desk Salespeople who contributed the most to alleviate the improvisational pull over their Desk Sales Managers. Not only did they meet their sales targets, but their over-achievement in sales compensated for the lack of achievement of the other types of Desk Salespeople on their team. If they were not prize-oriented, however, money-grabbers only alleviated the sales side of the improvisational pull. They did not report enough saleswork for Desk Sales Managers to hit their team's target.

Wage-earners were at E-Tel to earn a salary and make a living. Wage-earners avoided customer service work and reporting work. They spent their days loafing on their computer, playing on-line games or chatting in on-line forums. Wage-earners only engaged in work that their account managers or Desk Sales Managers enforced. Wage-earners did very little if anything at all to alleviate the improvisational pull over their Desk Sales Managers. They lagged

behind their sales and saleswork targets and they were not motivated by financial or career aspirations. Only continuous supervision ensured that wage-earners reported at least some sales and saleswork on Siebel.

Desk Sales Managers thus had to contend with a mix of Desk Salespeople, making meeting targets a challenging task. Ladder-hoppers were absent from their desks and had only limited relationships with their field account teams. They did not bring the revenue that Desk Sales Managers needed to hit their targets nor did they care about them. Ladder-climbers did report the revenue and the saleswork that Desk Sales Managers needed to hit their targets, but only just enough. Their role as Desk Salespeople was only provisional, as their goal was to climb up the hierarchy as soon as possible. Money-grabbers were at DeskSales to stay, and they did report the revenue that Desk Salespeople needed to hit their targets, but only a few of them cared about saleswork targets or following DeskSales senior managers' orders and requests. Wage-earners were just at DeskSales to make a salary. They lagged behind in every target and they had little if any appetite for work.

Money-grabbers and ladder-climbers used their relationship with their field account teams and their customers to achieve their targets. Mariah's tenure coincided with an increased enforcement of Siebel use throughout E-Tel. Desk Salespeople took on the increased Siebel work that field salespeople had to complete in exchange for being able to claim sole credit for part of field salespeople's sales. Desk Salespeople also extended their service work to customers. The goal was to increase their interaction with customers to get some of the orders that customers would place with E-Tel's service units. To this end, Desk Salespeople introduced themselves to customers as their "single point of contact at E-Tel." Desk Salespeople's goal was to have a service relationship with their customers unmediated by field salespeople. This gave Desk

Salespeople visibility of their customers' orders – orders that they could report in Siebel as the outcome of their own effort.

These two tactics helped ladder-climbers and money-grabbers contribute to their team's sales targets. Nonetheless, as tables 4.4. and 4.5. below show, reaching sales targets was much more of a challenge under Mariah's leadership than under Carmen's. The "created and owned" figures are not only far from the overwhelming over achievement of sales targets during Carmen's tenure as DeskSales General Manager, they also show a downward trend for all the Retail teams, especially worrying because the second trimester (April to June) is where most of the year's sales are made. The "involved" figure are also far from the consistent over-achievement during Carmen's tenure, with some teams lagging very much behind target, and most teams displaying a very erratic behavior.

Table 4.4. – Average new revenue per Desk Salesperson from "created and owned" sales for the first seven months of 2003, in thousands of dollars (average gap to target in parentheses).

Desk Sales Team	Jan. 03	Feb. 03	Mar. 03	Apr. 03	May 03	Jun. 03	Jul. 03
Finance 1	81.38 (37.63)	89.15 (45.40)	107.08 (63.33)	24.62 (-19.13)	29.69 (-14.06)	52.31 (8.56)	60.54 (16.79)
Finance 2	50.20 (6.45)	51.90 (8.15)	56.20 (12.45)	32.10 (-11.65)	24.50 (-19.25)	41.30 (-2.45)	36.20 (-7.55)
Retail 1	106.75 (63.00)	120.00 (76.25)	375.63 (331.88)	45.63 (1.88)	33.88 (-9.88)	77.25 (33.50)	20.00 (-23.75)
Retail 2	87.78 (44.03)	116.33 (72.58)	118.89 (75.14)	41.00 (-2.75)	45.11 (1.36)	19.33 (-24.42)	25.44 (-18.31)
Retail 3	192.50 (148.75)	228.75 (185.00)	217.25 (173.50)	43.25 (-0.50)	28.38 (-15.38)	17.38 (-26.38)	14.00 (-29.75)
Retail 4	46.40 (2.65)	52.10 (8.35)	52.90 (9.15)	76.80 (33.05)	74.50 (30.75)	40.80 (-2.95)	33.60 (-10.15)
Tech. & Media 1	296.71 (252.96)	591.71 (547.96)	594.14 (550.39)	96.29 (52.54)	66.29 (22.54)	93.00 (49.25)	81.29 (37.54)
Tech. & Media 2	48.14 (4.39)	78.00 (34.25)	82.14 (38.39)	50.00 (6.25)	70.00 (26.25)	75.57 (31.82)	48.14 (4.39)

Table 4.5. – Average new revenue per Desk Salesperson from “involved” sales for the first seven months of 2003, in thousands of dollars (average gap to target in parentheses).

Desk Sales Team	Jan. 03	Feb. 03	Mar. 03	Apr. 03	May 03	Jun. 03	Jul. 03
Finance 1	319.15 (294.15)	330.31 (305.31)	2353.15 (2328.15)	16.54 (-8.46)	4.69 (-20.31)	17.00 (-8.00)	73.00 (48.00)
Finance 2	148.50 (123.50)	236.30 (211.30)	243.60 (218.60)	4.70 (-20.30)	43.10 (18.10)	18.30 (-6.70)	106.90 (81.90)
Retail 1	277.00 (252.00)	336.00 (311.00)	341.25 (316.25)	8.75 (-16.25)	21.25 (-3.75)	29.75 (4.75)	168.50 (143.50)
Retail 2	13.78 (-11.22)	18.11 (-6.89)	34.89 (9.89)	3.67 (-21.33)	5.78 (-19.22)	19.11 (-5.89)	18.00 (-7.00)
Retail 3	37.50 (12.50)	47.38 (22.38)	40.88 (15.88)	0.50 (-24.50)	32.13 (7.13)	4.25 (-20.75)	2.13 (-22.88)
Retail 4	50.90 (25.90)	49.90 (24.90)	54.10 (29.10)	20.10 (-4.90)	20.50 (-4.50)	29.00 (4.00)	46.10 (21.10)
Tech. & Media 1	271.14 (246.14)	326.86 (301.86)	326.86 (301.86)	179.57 (154.57)	20.71 (-4.29)	69.86 (44.86)	163.00 (138.00)
Tech. & Media 2	41.43 (16.43)	27.71 (2.71)	28.14 (3.14)	9.71 (-15.29)	(1.57) (-23.43)	83.43 (58.43)	16.86 (-8.14)

Desk Salespeople also fared poorly in their saleswork targets. The reasons they failed to meet these targets changed from Carmen’s to Mariah’s leadership. Carmen equated saleswork to phone calls. To hit their saleswork targets, Desk Salespeople just had to call their customers. With Mariah, Desk Salespeople would only hit their sales targets if they called their customers and reported that they did so in Siebel. They also had to enter sales plans for every sale in Siebel logged under any of their accounts and they had to correct any errors in any Siebel sales record. Only ladder-climbers and prize-oriented money-grabbers put in the time and effort to hit these saleswork targets. All the other Desk Salespeople failed to do so. Tables 9 and 10 below show the average reported customer calls and the percentage of completed sales plans per team.

Table 4.6. - Average reported customer contacts per Desk Salesperson per day during the first 8 months of 2003 (target was 7 calls per day).

Desk Sales Team	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug
Finance 1	4.6	6.3	7.0	13.3
Finance 2	8.4	8.6	8.0	9.9
Retail 1	5.3	7.8	10.0	11.8
Retail 2	1.9	5.3	5.9	8.2
Retail 3	2.6	6.6	7.8	7.7
Retail 4	7.6	6.9	6.0	9.4
Tech. & Media 1	6.4	11.4	10.4	10.6
Tech. & Media 2	3.8	6.0	7.1	8.6

Table 4.7. - Percentage of Desk Salespeople's 'created and owned' and 'involved' sales with a completed sales plan during the first 8 months of 2003 (target was 100%).

Desk Sales Team	Jan-Feb	Mar-Apr	May-Jun	Jul-Aug
Finance 1	0.9%	11.9%	77.8%	93.5%
Finance 2	8.6%	26.2%	83.3%	85.7%
Retail 1	27.9%	37.3%	88.9%	88.2%
Retail 2	54.3%	60.5%	88.5%	80.0%
Retail 3	N/A	N/A	N/A	80.0%
Retail 4	49.2%	50.0%	66.7%	100.0%
Tech. & Media 1	51.7%	67.1%	93.9%	90.3%
Tech. & Media 2	41.9%	64.7%	42.1%	77.8%

The improvisational pull under Mariah's leadership was driven by Desk Salespeople's unwillingness and inability to sell. This pull was strengthened by Desk Salespeople's lack of effort in reaching their sales target, their saleswork target, or both because of their career goals and aspirations. The improvisational pull on Desk Sales Managers was nonetheless alleviated by ladder-climbers' and money grabbers' success in creating a representation of success in sales and saleswork without necessarily having to engage in either.

Addressing the first-line manager dilemma under Mariah's leadership

Mariah's demands on Desk Sales Managers' reporting work left them with very little time to spend actively managing their Desk Salespeople. Nonetheless, Desk Sales Managers

needed to have a high level of visibility and control over Desk Salespeople's sales and saleswork because Desk Sales Managers' bonus was only paid if every single Desk Salesperson on their team met their targets. To address this challenge, Desk Salespeople focused their interaction with their Desk Salespeople on a phone meeting with their team (labeled the "team audio-call" at DeskSales), which took place about once every week or once every two weeks – depending on how well the team was doing against its sales and saleswork targets. Although these meetings were conducted over the phone, they were also face-to-face in the sense that the team's Desk Sales Manager and its Desk Salespeople were sitting at their Desk in DeskSales' open space. Desk Sales Managers chose to conduct these meetings over the phone to keep them private and to avoid disturbing the other Desk Sales Teams. These calls could range from a five-minute announcement to an hour-long scrutiny of each Desk Salesperson sales targets, but on average they lasted for about 30 minutes. An analysis of all the audio-calls observed during Mariah's tenure as the DeskSales General Manager shows that Desk Sales Managers used these calls to enact five practices to ensure that their Desk Salespeople met their targets for reported sales and reported saleswork in Siebel. The appendix to this study details how each of these practices was enacted in each of the audio-calls under analysis. These five practices were: monitor Desk Salespeople's representation work (reporting sales and saleswork in Siebel); enforce representation work on Desk Salespeople; reward Desk Salespeople for their representation work; advise Desk Salespeople in how to hit their targets through representation work; and interpreting the conditions in which Desk Salespeople carried out their representation work. These practices are explained below.

Monitor

Desk Sales Managers could observe very little of Desk Salespeople's everyday work. The amount of reporting work that Desk Sales Managers had to do prevented them from observing their Desk Salespeople's work directly. Desk Sales Managers could only see the sales and saleswork that Desk Salespeople reported in Siebel. Desk Sales Managers could not see two aspects of Desk Salespeople's work that were crucial to assess their Desk Sales Teams' ability to reach its sales targets: their progress towards closing their open sales in Siebel or the sales that they could report as their own in Siebel but had yet to do so. As the analysis in the appendix shows, Desk Sales Managers used their audio-calls to monitor these two elements of their Desk Salespeople's work. These audio-calls were also an opportunity to monitor Desk Salespeople's progress towards their saleswork target.

The analysis of the audio-calls observed during Mariah's tenure reveals that Desk Sales Managers used these calls to monitor two aspects of their Desk Salespeople's work. One aspect of Desk Salespeople's work that Desk Sales Managers monitored was in their team's audio-calls was the progress of open sales reported in Siebel. Anthony's team audio-call of February, 24th shows how Desk Sales Managers used these calls to monitor what their Desk Salespeople were doing to close the open sales they reported in Siebel. Anthony called started by calling Gregory: "what are the scores on the doors for you today?" Gregory said that his open sales were still far from closing. Anthony then called Kevin, who replied: "I'm just catching up on stuff." Anthony retorted: "that's very specific Kevin" and laughed. Anthony then called Alexander who said that he had spoken with one of his field salespeople and that he had gotten permission to report a sale worth 100 000 dollars under his own name in Siebel. He said that his 15 million-dollar open sale

was now only due to close in March ("sorry Anthony"). Then it was Mark's turn, who said that he was "just following up stuff." The audio-call ended here.

As Anthony's audio-call highlights, Desk Sales Managers used these calls to see what they could not see in Siebel – the full process of their Desk Salespeople's representation work. Siebel only showed part of this process: the value of the each Desk Salespeople's open sales. It did not show the progress sales that Desk Salespeople had made towards reporting these sales as closed in Siebel. Without their audio-calls, Desk Sales Managers were not able to assess which of their Desk Salespeople's open sales were going to be reported as closed and which would be reported as lost or cancelled.

Desk Sales Managers also used their audio-calls to monitor Desk Salespeople's use of Siebel to report sales. Once Desk Salespeople reached their targets for the quarter, they stopped logging sales in Siebel. Desk Salespeople waited for the next quarter to log the sales they were allowed to report as their own in excess of what they needed to meet the current quarter's sales target. This allowed Desk Salespeople to hit their targets every quarter. Joseph, a Desk Salesman in one of the retail teams explained that people "always keep some [unreported sales] up their sleeves" so that they can produce them towards the end of the year so that they can make their numbers. Joseph said that once he discussed logging a sale in Siebel with one of his field salespeople and that she had told him that she could not stop him from logging the sale in Siebel but that he should wait until there are only a couple of weeks left before the sale gets closed [which would fall into the next quarter] before putting it up on Siebel. Joseph told me that "everyone in the sales chain does this" [keeping unreported sales up their sleeve], "from the senior managers down."

If their Desk Sales Team as a whole was lagging behind its sales targets, however, it was in Desk Sales Managers' interest to have these hidden or latent sales logged in Siebel. This would not help lagging Desk Salespeople hit their targets but it would allow the team as a whole to do so. In the second quarter of 2003, Roy's team was lagging behind their sales target, although Karl, one of his Desk Salespeople, had already reached his own sales target. In one of his team's audio-calls towards the end of the quarter, Roy attempted to have his Desk Salespeople report all the sales they could in Siebel. During the audio-call, he said, "knowing that we have a gap of 1 million, we need to have a pipeline of 3 million to make sure that we hit that." With that in mind, he asked if they had "any sales squirreled away under the blankets." "Do you have anything that you decided, "let's chuck it away for next month or let's keep this one off the radar," "do we have any sales records below 30% [probability of closing] that we could progress over the value chain in the next month??" He asked everyone individually, by calling their name. Adolph and Barry said that they didn't. Stewart shook his head with a smile, "that was a very shady no" Roy said "do you have one?" Stewart said that he did. Roy said "let's not move everything to 90% percent and expose ourselves, [but] if we're 100% sure put it up to 40%, [Mariah] is going to be looking at where we add value and if she only sees Stewart's [sales numbers] she may wonder what the hell we're doing here."

Desk Sales Managers focused their supervisory role on a very specific part of Desk Salespeople's work: reporting sales and saleswork in Siebel. The extent to which Desk Salespeople reported enough saleswork in Siebel to reach their targets could be monitored directly in this information system. Desk Sales Managers had only to use Siebel to count the number of reported calls, the number of sales plans and the number of sales records with errors for each of their Desk Salespeople. Desk Salespeople's reporting of sales was more difficult to

supervise. Open sales records in Siebel could take anything from a few hours to a few months to close. While open, sales records on Siebel would not count towards the team's progress towards their target. Desk Sales Managers thus had to monitor how near each of their Desk Salespeople's open sales records was to closing. Moreover, ladder-climbers and money-grabbers only reported the sales they needed to reach their quarterly targets and, in the case of money-grabbers, maximize their bonus. Ladder-climbers and money-grabbers kept all the other sales they were allowed to report as their own until the next quarter. Their goal was to consistently hit their targets and maximize their bonus. Desk Sales Managers needed visibility of these sales for two reasons: to have a sharper assessment of how close their Desk Salespeople were to reaching their quarterly and yearly sales targets, and to be able to have Desk Salespeople log these sales to allow the team as a whole to be able to reach its quarterly reported sales target.

More broadly, what is striking about Desk Sales Managers' use of their audio-calls to monitor their Desk Salespeople was their choice of target. Desk Sales Managers did not observe, nor did they seek to observe the work that allowed Desk Salespeople to report sales and saleswork in Siebel. Desk Sales Managers only sought to observe the reporting work Desk Salespeople engaged in, not their sales or saleswork.

Enforce

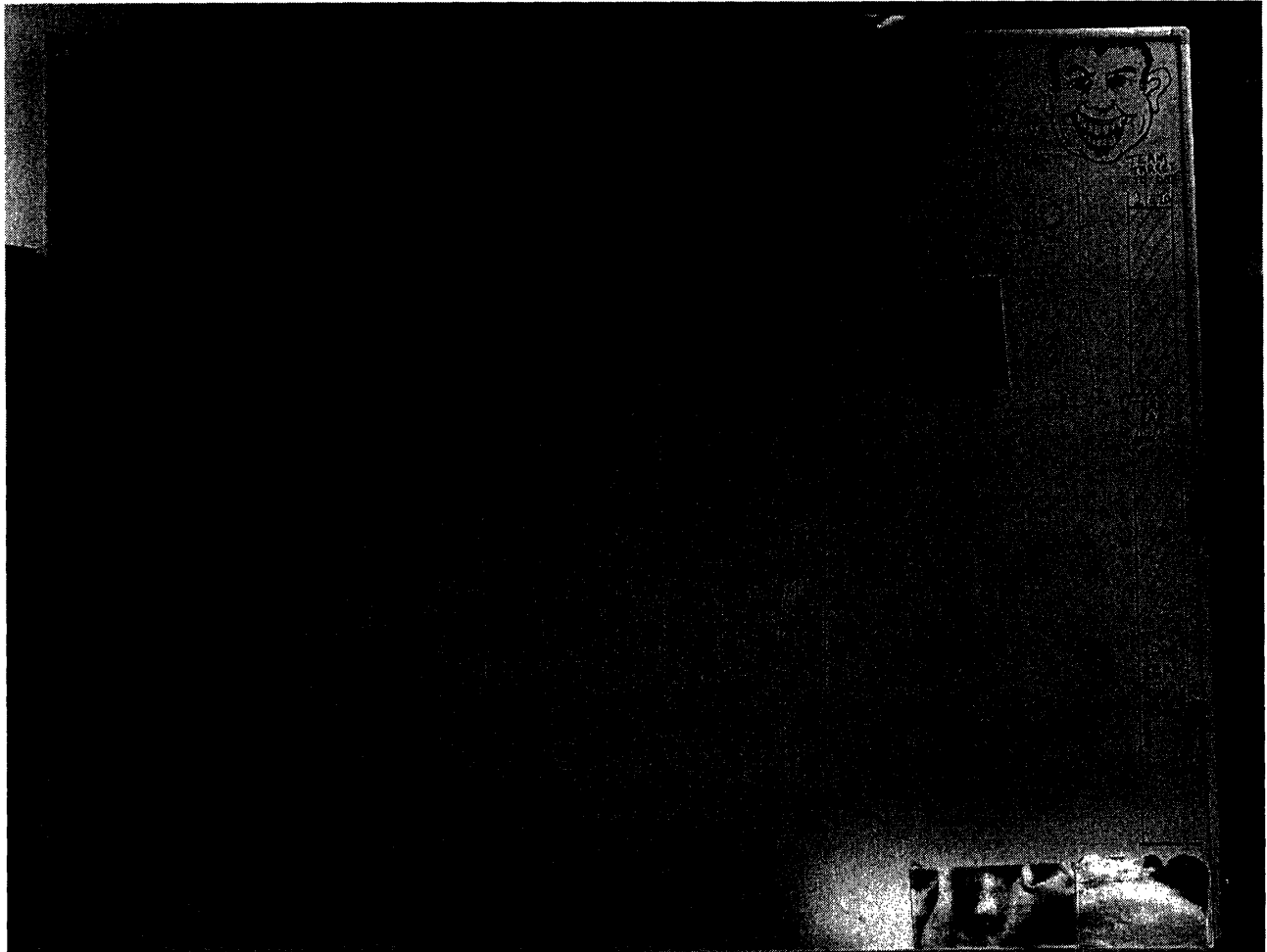
Siebel reports and team audio-calls often revealed a somber picture of Desk Salespeople's ability to reach their monthly reported sales and reported saleswork targets. The gap between the amount of sales and saleswork that Desk Salespeople had actually reported and the amount of sales and saleswork they needed to report for their team to hit its targets was often too wide. Desk Salespeople addressed this gap by enforcing representation work – ordering their Desk Salespeople to report sales and saleswork in Siebel.

As the analysis of Desk Sales Teams' audio-calls summarized in the appendix shows, Desk Sales Managers used their audio-calls to enforce representation work in two ways. One was by making Desk Salespeople's progress towards their target visible to others. Desk Sales Managers achieved this in two ways. One was by announcing each Desk Salesperson's sales and saleswork in audio-calls. In his audio-call of January, 15th, Ferdinand announced the closed sales reported in Siebel in an effort to get his Desk Salespeople to report more closed sales. Ferdinand started by announcing the total revenue figures for each Desk Salesperson. Laura has 5 million, "well done." Oscar "hot on your heels," Ferdinand added to Laura. Kyle got 67,000, "well done." Nancy, has "lots of quotes" but she needs to "translate them into [closed sales] in Siebel." Nancy replied that quotes would take 2 to 3 months to be in Siebel because she needs to track them down with Service. Nancy added that there are 1,500 orders now from one of her customers alone but they're all going through Service. Ferdinand and Kyle said that she could ask service to claim it too because they did not have any bonus to lose. Ferdinand said: "let's be as sneaky as we can." He continued to read through the revenue numbers: Don has 800,000, he added that "let's not go into that because he's not here." Christine had 1.5 million: "Christine is really storming up now, well done Christine." Ferdinand said that the team as a whole had brought in 10 million of revenue. "When people from management come down you should now this so that you can tell management so that we'll look good," Ferdinand added.

The other way in which Desk Sales Managers made Desk Salespeople's numbers visible to each other was by using their team's whiteboard. Whiteboards were designed in table format. Desk Sales Managers used these tables to record their Desk Salespeople's achievement towards

their targets. Exhibit 4.4. shows a team's whiteboard, Table 4.8. maps the evolution of whiteboards across time¹⁰.

Exhibit 4.4. – An example of a team's whiteboard circa September 2003.



¹⁰ The Technology and Media Desk Sales Team 2 did not have a whiteboard during the time of this study. The team's Desk Sales Manager explained that the whiteboard was "too call-centric" and that the team had voted not to have one.

Table 4.8. – Evolution of Desk Sales Teams’ whiteboards.

Team	Up to April 2003	April 2003	May 2003	June 2003	July 2003	August 2003	September 2003
Finance 1	No whiteboard		- Team yearly totals for sales targets and actual sales - Top five open and closed sales for the team	- Team yearly totals for sales targets and actual sales - Total yearly sales for each team member	- Team yearly totals for: sales targets; actual sales and gap between sales targets and sales - Individual yearly totals for: sales targets; actual sales and gap between sales targets and sales - Weekly customer calls for each team member		
Finance 2	- Largest sale in the team	- Key focus areas - Total yearly sales for the team	No whiteboard	- Total yearly target for the team	- Team yearly totals for: sales targets; actual sales and gap between sales targets and sales - Individual yearly totals for: sales targets; actual sales and gap between sales targets and sales - Weekly customer calls for each team member - Focus areas		
Retail 1	- Total weekly sales for each team member - Total daily customer calls for each team member	- Total weekly sales for each team member	- Total yearly sales for each team member - Total weekly customer calls for each team member				
Retail 2	No whiteboard		- Total yearly customer calls for each team member - Key focus areas - Total yearly sales for each team member	No whiteboard	- Team and individual yearly totals for: sales targets; actual sales and gap between sales targets and sales - Weekly customer calls for each team member - Focus areas	- Team and individual yearly totals for: sales targets; actual sales and gap between sales targets and sales - Daily customer calls for each team member - Focus areas	
Retail 3	No whiteboard	- Team and individual yearly totals for: sales targets and actual sales - Weekly target and actual customer calls for each team member - Focus areas	No whiteboard	- Team yearly totals for: sales targets and actual sales - Weekly customer call target for the team - Total weekly customer calls for the team - Total yearly sales for each team member			
Retail 4	- Two largest sales in the team	- Total weekly customer calls for the team - Total yearly sales for each team member - Total sales plans for each team member		- Total yearly sales for each team member	- Individual yearly totals for: sales targets and actual sales		
Technology and Media 1	No whiteboard			- Individual yearly totals for: sales targets and actual sales			
Technology and Media 2	No whiteboard						

Linda, a Desk Sales Manager in one of the Finance teams explained her rationale for having a whiteboard:

Those who feel embarrassed because they're not at the top [...] quite often come up [to talk to me] and say 'I'm not doing well here' and then we'll have a discussion about that.

Whiteboards thus allowed Desk Salespeople to use shame and loss of face to enforce representation work. Desk Salespeople interpreted their position on their team's whiteboards as connected with their face at work. Roy, a Desk Sales Manager in one of the retail teams, ranked his Desk Salespeople according to their reported closed sales in Siebel. The rankings were published using a hierarchy based on characters from the Star Wars movies (see Exhibit 4.5.). The first week after Roy started using his "Score Wars" hierarchy, Kathryn, a wage-earner on his team, occupied the bottom position, she was the team's "Ewok." She said that she thought it was "a bit childish" and that "how embarrassed you are depends on your place [in the hierarchy]." She spent the rest of the day posting her résumé to job-search websites. John and Ted, two Desk Salespeople on one of the finance teams, dealt differently with a threat to their face resulting from their Desk Sales Manager's use of their whiteboard. At the beginning of the 2003/2004 financial year, three of John's four accounts and two of Ted's three accounts were transferred to E-Tel's small business sales unit, two months after the start of the financial year. John's and Ted's achievement towards their target dropped significantly. John complained "between me and Ted we lost 60K when some of our accounts were moved to Small Business Sales. If you look at our team's board, it seems that Ted and I did fuck all but it's not true." He added that, "we asked Linda [their Desk Sales Manager] to put a note on the whiteboard to say that our figures did not include the accounts that went to the Small Business Unit [so that] well, because everyone can see it and so that everyone doesn't think that we've done fuck all!"

Exhibit 4.5. – Roy’s Star Wars sales hierarchy (names blurred for confidentiality).



The Scores On the Doors!

1. Darth Vader – The Dark Lord

[Blurred] 566.52k

2. Luke Skywalker

[Blurred] 516.9k

3. Hans Solo

[Blurred] 143.7k

4. The Emperor

[Blurred] 131.8k

5. Yoda

[Blurred] 125.5k

6. C3PO

[Blurred] 109.5k

7. R2D2

[Blurred] 91.7k

8. Chewbacca

[Blurred] 75k

9. Storm Trooper

[Blurred] 47k

10. Ewok

[Blurred] 14.5k

SCORE WARS

The second way in which Desk Sales Managers enforced representation work was by directly instructing Desk Salespeople to report sales and saleswork in Siebel. In his audio-call of May 2nd, Andrew instructed his Desk Salespeople to report sales following Siebel's sales cycle. Siebel had a model of the stages that a sale had to go through. After going through his Desk Salespeople's open sales, Andrew then asked if there were any large sales to be closed that week. Stella said that she would probably have something next week. Michael said that he had his "80K one," but she was still unsure when she was going to put it on Siebel. Andrew replied, "don't keep too much off Siebel, our team doesn't lose any open sales and that's not good." Larry added, "if you look on Siebel, we have a very high conversion rate, that's not a true picture." Andrew said that "we don't want open sales to be logged in Siebel at 100% probability, that looks very reactive." Larry retorted, "yes, but we get a lot of orders" and Michael replied, "well, we can hold them and log them at a lower probability and close them a few days later." Andrew said that "we need to follow all steps [stages in the sales cycle] because it puts them [open sales] on the radar early." According to Siebel, sales started as leads, then changed to opportunities and ended as contracts. "Lead" was the stage at which a salesperson detected a customer's need. "Opportunity" was the stage at which a salesperson presented the solution to the customer. "Contract" was the stage at which the customer purchased the offered solution. Desk Salespeople did not sell, they only reported doing so with the permission of field salespeople. Because the sales Desk Salespeople logged in Siebel as their won were already concluded, Desk Salespeople entered them at the "contract" stage. This revealed that Desk Salespeople were not engaging in sales but in taking orders. Andrew instructed his Desk Salespeople to follow Siebel's sales cycle to create the representation of selling when in fact they only reported sales that field salespeople had already closed.

Thus, when feelings of loss of face and shame did not assure that Desk Salespeople met their targets for representing sales and representing saleswork, Desk Sales Managers ordered them to engage in more reporting work.

As the audio-call analysis summarized in the appendix shows, Desk Sales Managers instructed their Desk Salespeople to follow specific processes when reporting sales and saleswork for two reasons. One reason for doing so was to ensure that Desk Salespeople reached their reporting targets. In his audio-call of April, 14th, David, a Desk Sales Manager in one of the Finance teams, explained to his Desk Salespeople how to break down their targets to make sure that Desk Salespeople would reach them. David told them that they needed to divide their yearly target by the number of weeks in the financial year so that they know how much they should be doing each week. He also told his Desk Salespeople to split their target in two portions: one worth 70% of their total target and another worth the remaining thirty percent. The larger portion corresponded to their target for “information technology products” and the other half to their target for “communication technology products.” David concluded this explanation by saying, “that sounds easy, doesn't it?” He added that they should get 50% of their target in the first quarter of the financial year, because companies tend to buy less in the fourth quarter. David admonished his team, “I can't tell you how important this [reaching the targets] is.” He said that Mariah was putting constant pressure on him. David emphasized that the only way out of it is for them to hit their targets. If targets are hit, then “we won't be managed so intensely.”

Another reason to order Desk Salespeople to follow specific procedures when reporting sales and saleswork was because the very process of using Siebel was a representation of their Desk Sales Team’s activity. As Andrew’s comment during his audio-call suggests, reporting sales in Siebel at the “contract” stage represented their team as an “order taking” unit. If Desk

Salespeople reported a sale following all of Siebel's sale stages, then their Desk Sales Team would appear to engage in "sales making."

Desk Sales Managers also ordered Desk Salespeople to report specific levels of sales and saleswork. In her audio-call of July 14th, Nina, a Desk Sales Manager in one of the retail teams emphasized the need for Desk Salespeople to hit their reporting targets. In the call, Nina said that she wanted to talk about their targets. She told her Desk Salespeople that they needed to report seven customer calls a day. Nina told them that they also needed to start to report more sales, "we need to be on double digits every week." She said that she wanted them to have 10 new open sales records in Siebel each week. Nina added that, "95% percent accuracy on Siebel is not enough, other teams are getting 100%. We need to raise the bar. That's why you need to be using those queries that Lee [the team's Deputy Desk Sales Manager] sent you yesterday at least once a week." She told them that they should keep focusing on "created and owned" wins, so that would reach their target before the end of the year, "[then] you can forget about it [the target for reported "created and owned" sales] and get paid for it, and that'll be a great position to be in."

When Desk Sales Teams had failed to meet their reported saleswork targets, Desk Sales Managers enforced compliance by ordering Desk Salespeople to report saleswork in Siebel immediately. In his audio-call of September, 9th, Josh, a Desk Sales Manager in one of the Technology and Media teams, looked up each of his Desk Salespeople's customer calls in Siebel. When he got the results, he was very disappointed that no-one had reported their minimum level of customer calls. Scott had only reported 3 for the week when the target was 7 a day. Josh called Scott and told him that he was very disappointed. Scott asked how many he was supposed to do and Josh said 35 (Scott was off sick for 2 days). Scott said that he would do the 28 he had left, Josh said that they had to be dated for yesterday or before, and he had to do it before 10 am. Josh

complained that when he saw his figures "I nearly cried, I nearly wept when I saw that!" He then told the rest of the Desk Salespeople on his team, "make sure that you have 35 customer calls [logged] in Siebel before 10 am [that's when this week's report is run]." Eric, one of the Desk Salespeople on Josh's team answered, "make up those [customer calls] ladies and gentlemen, make up those [customer calls]." He added "I'm going to try to beat those 140, I'm hitting the copy-paste button right now," referring to another Desk Salesperson logging 140 customer calls in Siebel the previous week.

The analysis of audio-calls observed during Mariah's tenure summarized in the appendix shows that Desk Sales Managers enforced reporting work, not sales or saleswork. Desk Sales Managers did not make their Desk Salespeople's sales or saleswork visible to others, only the representation of those sales and that saleswork. Similarly, Desk Sales Managers did not order their Desk Salespeople to sell more or to make more calls to customers. Instead, they ordered them to log more sales or report more calls to customers in Siebel. Desk Sales Managers enforced Desk Salespeople's representation work, not their work itself.

Reward

Desk Sales Managers used their team's audio-calls to reward their Desk Salespeople. Desk Sales Managers used two types of rewards. Material and symbolic (Table 4.9. lists material and symbolic rewards across teams).

Table 4.9. - Material and symbolic rewards across teams.

Desk Sales Team	Material rewards	Symbolic rewards
Finance 1	- High priced alcoholic beverages to reward ad-hoc individual reporting work	- Praise of individual Desk Salespeople's reporting work in the team's audio-call
Finance 2	- High priced alcoholic beverages to reward ad-hoc individual reporting work	- Praise of individual Desk Salespeople's reporting work in the team's audio-call
Retail 1	- Dinner for the whole team to reward team sales performance	- "Golden Salesman" statuette to reward individual reporting of sales in Siebel - "Team cup" award to reward individual reporting work - Praise of individual Desk Salespeople's reporting work in the team's audio-call
Retail 2	- Drinks for the whole team to reward team sales performance	- Desk Salesperson of the week award (name highlighted on the team's on the whiteboard) - Praise of individual Desk Salespeople's reporting work in the team's audio-call
Retail 3	- Drinks for the whole team to reward team sales performance	- Praise of individual Desk Salespeople's reporting work in the team's audio-call
Retail 4	- Dinner for the whole team to reward team sales performance	- "Team cup" award to reward individual reporting work
Technology and Media 1	- High priced alcoholic beverages to reward ad-hoc individual reporting work	- Naming of Desk Salespeople for company-level awards - Desk Salesperson of the week award (name highlighted on the team's whiteboard) - Praise of individual Desk Salespeople's reporting work in the team's audio-call
Technology and Media 2	No material rewards	- Praise of individual Desk Salespeople's reporting work in the team's audio-call

Desk Sales Managers offered good quality and high-priced alcoholic beverages to their Desk Salespeople as an incentive to achieve specific, short-term reporting goals. In his audio-call of July 7th, Josh, A Desk Sales Manager in one of the Technology and Media teams, announced an incentive to reward the Desk Salesperson that reported the largest number of open sales in Siebel during the upcoming month. Josh announced pompously that he will give a bottle of champagne to the person that reported the most open sales on Siebel, "I want proper [open sales records] going on there, not a load of bollocks. I want to see them actually converted into [closed sales]." Scott, one of the Desk Salespeople on the team, asked "what make of champagne?" Jason

replied “Bollinger.” Josh added that "this incentive is just a launch pad. I want this to go along, it's part and parcel of the role, really."

Desk Sales Managers also used symbolic rewards – plastic Oscar figurines, paper ribbons and tin cups – to reward reporting sales and saleswork. These rewards were not aimed at fostering an increase in sales and saleswork. Instead, these rewards aimed at recognizing Desk Salespeople’s achievement towards their reported sales and reported saleswork targets. Andrew had his “Golden Salesman” award for the Desk Salesperson whose sales totaled the highest revenue each week. At the start of his audio-call on August 15th, Ferdinand, a Desk Sales Manager in one of the Retail teams announced that it was time to award "the trophy," "Oscar is not the best performer anymore, although he might be," Ferdinand proclaimed. He said that "this week the trophy is going to someone that has been exhibiting the right behaviors, it's Casey!" Casey raised his arms in sign of victory and the team applauded. Ferdinand handed him the trophy while saying, "we got some feedback on your sales plans that you actually took them seriously, while a lot of the others were taking the piss. Also you had a great turnaround in your [reported sales] in the past two weeks." Mild applause followed. Ferdinand said that it was time to take the picture and Casey moved next to the window and Ferdinand used a Polaroid camera to take a picture of him with the trophy¹¹. Casey then put the picture and the tin trophy on top of his desk.

Desk Sales Managers also used formal E-Tel incentives to reward their own team. In her audio-call of July 11th, Linda, a Desk Sales Manager in one of the Retail teams, used her prerogative to nominate two Desk Sales People in her team to E-Tel’s “Beyond the Call of Duty.” Linda announced that she had nominated Ruth and Chris for the award, which aimed to recognize outstanding contributions to E-Tel and outstanding customer service. She said that she

¹¹ This camera produces a printed picture a few minutes after the picture is taken.

had nominated two people on the team but that there were only going to be two winners in the whole of DeskSales and that she was sure that all the other teams were also nominating people. Linda said that there would be an award ceremony on August 27th and that the award would be presented by E-Tel's CEO. She said that she was actually going to announce the people she was nominating because "it will be a flavor of what I see as model behaviors." Linda read from her nominations saying that she nominated Ruth because "Ruth is completely focused on her targets." She announced that she also nominated Chris because, "he has achieved his yearly targets on the first quarter."

In his audio-call of July 24th, Daniel, a Desk Sales Manager in one of the Technology and Media team used a bottle of champagne he earned at a sector event the previous day to reward Andy, one of his team's top Desk Salespeople. He said that "Christian [the Technology and Media Top Manager] loves us," and that "Christian has completely bought into this model [using Desk Salespeople]" because he was "very pleased" with the work they were doing. Daniel pulled out a bottle of champagne and said that "I was dragged on stage and Christian gave me this bottle of champagne and there was a lot of applause." He added, "you're the ones doing the hard work, so I want to give this bottle of champagne to you." He said that he realized that he couldn't share the bottle of champagne with everyone, so he was going to give it to the person with whom senior management was most impressed, Kevin. Everyone applauded and Daniel handed the bottle of champagne to Kevin.

Desk Sales Managers rewards thus followed their monitoring and enforcing practices. Desk Sales Managers' rewards focused on Desk Salespeople's representation work, not their actual sales or saleswork. Material and symbolic rewards recognized the use of Siebel to report sales and saleswork, not sales and saleswork themselves.

Advise

Desk Sales Managers could enforce and reward their Desk Salespeople's representation work but still see their team lagging behind its reported sales and reported saleswork targets. Desk Salespeople could have the motivation to report sales and saleswork but not the skills to sell, the permission to log as their own the sales made by their field salespeople, or the opportunity to call their customers. To address this, Desk Sales Managers advised their Desk Salespeople to on how to reach their sales and saleswork targets. The analysis of audio-calls summarized in the appendix shows that Desk Sales Managers advised their Desk Salespeople in three ways. First, Desk Sales Managers helped Desk Salespeople reach their revenue targets by telling them how to use E-Tel's information systems to find revenue. In her audio-call on March, 4th, Nina, a Desk Sales Manager in one of the Retail teams, explained how to use one of E-Tel's information systems to find revenue that Desk Salespeople could claim as their own. She explained to her Desk Salespeople that "in E-Tel you'll soon find that things aren't like they should be: sometimes [some of the product revenue from your accounts] is not visible on ARTS [E-Tel's automatic revenue tracking system]." Nina added that "If I spend the whole day [selling] to [one of my accounts] and they're not in the system, I would be wasting all my time because I wouldn't see the revenue." She continued: "sometimes you get products allocated to your account on ARTS that the [customer hasn't bought] and they [bring revenue]: those ones you want to keep, so keep quiet." Nina explained: "basically, the more you look, the more you'll find and it's a way to get revenue without having to sell anything. Of course, you will eventually have to sell something, but it's a good way to hit numbers."

Second, Desk Sales Managers also helped their Desk Salespeople meet their targets for reported sales by giving them specific advice on how to establish relationships with their field

sales teams. In her audio-call of February, 19th, Nina used a question made by Dennis, a Desk Salesperson on her team, to explain to her Desk Salespeople how to get field sales people to allow them to log sales in Siebel. Towards the end of the team's audio-call Dennis raised his hand and Nina gave him leave to speak. Dennis said that there were a lot of large open sales for his accounts in Siebel and asked Nina how he could get some of the credit for those sales. Nina told the story of how Robert, another Desk Salesman on her team, got involved in an 8.6 million dollar opportunity that was about putting E-Tel Broadband access CDs in a retailer's stores. Nina explained how Robert's involvement was limited to calling the stores to make sure that they got the disks. Nina said that "even making a quote [giving the price of a product] is involvement." She concluded: "what I would do is ask the account team if there's something I can do to help."

Josh created a report of all the open sales worth 75,000 dollars or less in revenue that field sales people had reported in Siebel. He sent that report via email to his Desk Salespeople prior to his audio-call of September, 4th. When his audio-call started, Josh said that he sent a spreadsheet with all opportunities on Siebel under 75,000 dollars in revenue, "so it can help you focus on some quick wins." He then asked how field sales people reacted when Desk Salespeople "ask[ed] them to get involved in deals [i.e., report closed sales in Siebel as the result of their individual saleswork]." Martin said that he had had some trouble with his field salesperson who was afraid that if it was Martin putting everything on Siebel, his own boss would asking "how come your Desk Salesperson is doing all these deals and you're not, where's your contribution?!" Josh explained that his point of view was not correct, "the point is that field salespeople should not deal with sales lower than 75,000." He added that "they should be doing the higher complexity stuff and we should do the 'donkey work', which we are excellent at doing." Referring to the sales on the spreadsheet he had just sent, Josh said "the hard work has

been done – we only need to convince field sales people that we're better at doing the rest of the work ourselves." He added that "it's also important to convey the message that they won't be penalized if they pass this stuff to us because they're paid by the total account revenue."

Thirdly, Desk Sales Managers advised their Desk Salespeople on how to log sales and saleswork in a way that helped Desk Salespeople reach their targets consistently. Andrew told his Desk Salespeople to refrain from reporting sales in Siebel after they had reached their quarterly targets. He advised his Desk Salespeople to report those sales in the following quarter to make their targets easier to reach. In his January 15th audio-call, Ferdinand advised his Desk Salespeople on how to go about reporting customer calls in Siebel. Ferdinand told them to report "any contact with customer" in Siebel. Laura, one of the Desk Salespeople on his team, asked if the "emails that you get" count. Ferdinand said that they did, but "try to keep it relevant," "I don't want Siebel clogged" with irrelevant information. "You would want to add on a call from a customer clarifying what that quote was." He was quick to add: "Don't make your numbers plummet because of that." Don concluded "it's the [target] thing" and Ferdinand nodded in agreement. Don said that the point is to "hit 10 and then worry about relevance after [they hit 10]." Ferdinand said that to reach targets the boundaries can be "stretched" but then they should "retract."

Desk Sales Managers' actual advice sharpens the case that they were focusing on reporting work. Desk Sales Managers might need to monitor, enforce and reward representation work because Desk Salespeople were engaging in sales and saleswork without reporting it in Siebel. Desk Sales Manager's advice, however, focuses on how to scavenge unclaimed sales and how to persuade field salespeople to allow Desk Salespeople to take credit for field salespeople's sales. The tactics that Desk Sales Managers taught to their Desk Salespeople in their team's

audio-calls helped Desk Salespeople hit their reporting targets without actually engaging in any of the work they reported.

Interpret

A final set of practices encouraging representation work consisted of interpreting orders and policies. Desk Sales Managers used their team's audio-call to announce, explain and interpret their General Manager's orders and policies. When she first took on the Desk Sales Manager role, Nina gave her Desk Salespeople her own interpretation of their role and their targets. She started by saying that "we have easy targets." She continued "the more money you make, the more money I make," adding "that's what we're here for at the end of the day." Nina said that saleswork numbers were good and "showing a positive trend." She emphasized that they needed to continue to meet these targets. "I don't care how you do it." Nina thus portrayed the relationship between Desk Salespeople and their role as transactive. She also disclosed her own ethics as goal-centered and unconcerned about Desk Salespeople's choice of means. Nina gave her Desk Salespeople the mandate to reach their sales targets by whatever path they were comfortable with.

Desk Salespeople interpret some of their General Manager's decisions as illegitimate, without any grounds other than their General Manager's whims. On such occasions Desk Sales Managers used their audio-calls to attempt to shape their Desk Salespeople's interpretation of their General Manager's actions. The way Linda, a Desk Sales Manager in one of the Finance teams, announced the implementation of a Siebel-based call monitoring system to her team highlights the challenges in shaping Desk Salespeople's interpretation of their General Manager's decisions. After announcing a visit from an E-Tel senior manager, Linda announced that "we're trialing Contact Central starting in October, which will record everything for you."

She added, "it saves you all that crap you have to do of recording inbound calls and outbound calls, it'll do all that admin work for you." Linda said that for it to work, Desk Salespeople needed to start using their 800 numbers instead of their direct dialing numbers. Sherry replied, referring to Contact Central, "that's a call center thing isn't it?" Linda retorted, "it depends how you use it, it's the same applications you use now but they're all on a central box" – "it eliminates all that bureaucracy." Roberta said, "our [customer calls] numbers will go through the roof with this because everything will be logged. Jerome agreed, "that's why [another team who had been trying Contact Central for a while] is always on top [of saleswork stats]." Linda also told them that, "it's a trial, so we can tailor it to how we want to use it." Sherry said that "the culture is turning into a call center kind of culture, with the headset on all the time." Patrick replied, "you don't need to have your headset all the time, you can log off, as you can do with your own phone." He added, "It will just make it more efficient, you have everything together." Sherry asked about how much the other team was liking it. Linda said that they were not using that much because they did not have 800 numbers so the automatic records for customer calls did not pop up. The main feature of Contact Central was not that useful. She added, "it is a trial, so your feedback is essential, so you don't have to do all this double accounting and all that."

Desk Sales Managers did more than just attempt to shape Desk Salespeople's interpretations of specific events in their experience at DeskSales. Desk Sales Managers also used audio-calls to attempt to shape Desk Salespeople's interpretations of the *durée* of their experience at DeskSales. In his December 12th audio-call, Ferdinand, a Desk Sales Manager in one of the Retail teams, interpreted the performance measurement systems that Mariah put in place. He said that the daily target achievement information was for their own orientation. He warned that the weekly information on target achievement went to E-Tel's senior managers and

there was a weekly call where each of the Desk Sales Managers had to explain why they did not reach their targets. Ferdinand said that sales and saleswork numbers were fed back to senior managers. He also stressed that not only were poor performers mentioned, but also are over-achievers. He said that “Siebel measures the way we do business and how successful we are” and that the records were “completely transparent,” and that was one of its major advantages. Ferdinand concluded that “everything we do is highly visible, it’s fully on the radar.”

Audio-calls allowed Desk Sales Managers to attempt to shape Desk Salespeople’s interpretations of their role and of their experience at DeskSales. Audio-calls were the stage for announcing Mariah’s policies and orders. When making these announcements, Desk Sales Managers had the opportunity to observe Desk Salespeople’s reactions and the opportunity to shape these reactions to match their own interests and goals.

DISCUSSION

This chapter started with a simple but important question: when faced with both a strong bureaucratic push and a strong improvisational pull, to which pressure do first-line managers yield? Desk Sales Managers’ experience of the first-line manager’s dilemma and the tactics they used to address it are summarized in table 4.10.

The way Desk Sales Managers addressed their experience of the first-line manager’s dilemma shows how information technology can be used to address these opposing forces by creating a façade of compliance with the bureaucratic push, reducing the improvisational pull to employees’ ability and willingness to participate in the production and reproduction of that façade.

Table 4.10. – Experiencing and coping with the first-line manager’s dilemma at DeskSales¹².

		Carmen’s leadership	Mariah’s leadership
Bureaucratic push	+	<ul style="list-style-type: none"> - “Stretch” sales target - Bonus and ad-hoc incentives only rewarded very large sales 	<ul style="list-style-type: none"> - “Stretch” sales target <ul style="list-style-type: none"> . public commitment to “stretch” sales target . 2/3 of time to achieve sales target - Multiple sales and saleswork targets - Siebel-based criteria for achieving sales and saleswork targets - Competing with field salespeople for credit in sales
	-	<ul style="list-style-type: none"> - Computer-mediated supervision of saleswork - Narrative-based supervision of sales 	<ul style="list-style-type: none"> - Siebel-mediated supervision of sales and saleswork
Improvisational pull	+	<ul style="list-style-type: none"> - Lack of sales skill and sales training - No relationships with customers 	<ul style="list-style-type: none"> - Less DSPs with sales background - Poorer sales training - Visible effect of different motivational profiles
	-	<ul style="list-style-type: none"> - DSPs used Siebel to represent involvement in sales - DSPs did menial work for FSPs in return for involvement in sales 	<ul style="list-style-type: none"> - Some DSPs used Siebel to represent sales and saleswork - Some DSPs were able to do menial work for FSPs in return for involvement in sales
Coping tactics		<ul style="list-style-type: none"> - Create narratives of DSPs’ involvement in sales - Reward DSPs for reporting involvement in large sales <ul style="list-style-type: none"> . with symbolic rewards . with verbal recognition - Fake and help DSPs fake saleswork 	<ul style="list-style-type: none"> - Monitor, enforce and reward the representation of sales and saleswork in Siebel - Advise DSPs on how to create representations of successful sales and saleswork in Siebel without engaging in either

The literature on bureaucracy has documented two patterns of first-line managers’ response to the dilemma created by the bureaucratic push and the improvisational pull – adaptation and imposition (cf. Adler & Borys, 1996). When enacting the adaptation pattern (e.g., Blau, 1955), first line managers attempt to adapt prescribed roles, rules and procedures to the contingencies of their employees’ everyday work. When enacting the imposition pattern (see Gouldner, 1954, chapter 11) first-line managers attempt to have their employees comply with

¹² For brevity, this table uses DSPs to abbreviate Desk Salespeople and FSPs to abbreviate field salespeople.

prescribed roles, rules, procedures and goals, irrespectively of the contingencies that employees face in their everyday work.

The literature on IT and organizations argues that the added visibility that computer-mediated supervision allows, forecloses the possibility of enacting the adaptation pattern (cf. Ball, 2003; Coombs et al., 1992; Sewell, 1998). Upper-level managers' use of information technology to supervise the work of their first-line managers and their employees makes any deviation from prescribed roles, rules, procedures and goals visible to upper-level managers. This visibility allows upper-level managers to discipline such deviations into compliance. Desk Sales Managers' tactics to deal with the first-line manager's dilemma at DeskSales suggests that there is another possible response to the first-line manager's dilemma in contexts of computer-based supervision – the façade-creation pattern. This pattern consists of creating using information technology to create a representation of compliance with the bureaucratic push while circumscribing the improvisational pull to employees' will and skill to create that representation of compliance. If Desk Sales Managers had followed an imposition pattern, they would have enforced sales and saleswork and train their Desk Salespeople to become increasingly proficient at both types of tasks.

Desk Sales Managers drew on a quite different set of tactics. They interpreted the bureaucratic push enforced by their General Manager as a push for a formal representation of sales and saleswork, rather than as a push for sales and saleswork. The way upper-level managers used information technology (especially Siebel) supported this interpretation. DeskSales' General Manager and upper level managers at E-Tel used the formal representation of Desk Salespeople's work in Siebel to monitor and supervise Desk Sales Teams' performance. During Carmen's tenure as DeskSales General Manager, Desk Salespeople were supervised

through Desk Sales Management's account of Desk Salespeople's involvement in sales reported in Siebel. Desk Salespeople's saleswork was supervised by measuring and monitoring a set of phone-usage statistics reported by a software package implemented for that purpose. During Mariah's tenure as DeskSales General Manager, saleswork was supervised through Desk Salespeople's reporting of calls to customers in Siebel. Sales were supervised by Desk Salespeople's use of Siebel to report selling directly to customers, finding sales opportunities and close sales opportunities initiated by field salespeople. DeskSales' General Manager and upper-level managers at E-Tel supervised representation of work, not work itself. The specific representation used at DeskSales had two important features. The first was that each of these representations allowed Desk Sales Managers and Desk Salespeople to create a representation of sales and saleswork without having to carry out either set of tasks. During Carmen's tenure, Desk Salespeople could call service units, their customers, friends, family or each other to reach their saleswork targets. Carmen only supervised how much time each Desk Salesperson had spent on the phone and how many calls each had made. She cared not to whom those calls were made. Carmen also required nothing but Desk Salespeople's name in Siebel sales records and a plausible account of Desk Salespeople's involvement in a sale to credit it towards their sales target. This allowed Desk Salespeople to hit their sales targets by taking on field salespeople's menial tasks and their customer service work without making a single sale. During Mariah's tenure, Desk Salespeople did not even have to reach for their phone to reach their saleswork targets. They had only to use Siebel report that they had called their customers. Desk Salespeople reached their saleswork targets by pressing the "copy-paste" keyboard shortcut in their computers, not by pressing the digits in their phone keypads. Mariah had stricter criteria to accept Desk Salespeople's representation of their ownership of, or their involvement in sales.

This, however, only meant that Desk Salespeople had to take on more of their field salespeople's menial tasks, more of their customer service work, and be more adept at scavenging E-Tel's information systems for customer orders that Desk Salespeople could represent as their own sales.

The locus of creation of these representations also contributed to Desk Sales Managers having the opportunity to interpret the bureaucratic push as a pressure to represent compliance, instead of interpreting as a push to comply with prescribed roles, rules and procedures. Siebel – by the very nature of sales and saleswork – is a self-reporting information system. Siebel could not automatically track Desk Salespeople's involvement in sales. It relied on Desk Salespeople's reporting sales under the surveillance of Desk Sales Managers and field sales people. The assumption was that Desk Sales Managers were close enough to Desk Salespeople to be aware of their actual involvement in sales. Field salespeople were close enough and had enough of a stake in their accounts to ensure that Desk Salespeople would not claim credit for sales that they did not make, even with the connivance of their Desk Sales Managers.

Desk Sales Managers had financial, career and identity-related reasons to allow their Desk Salespeople to report ownership and involvement in sales when they in fact did not. Desk Sales Managers' bonus was contingent on every Desk Salesperson on their Desk Sales Team reaching their sales target. Desk Sales Managers that headed Desk Sales Teams with higher levels of performance were invited to E-Tel's headquarters. Their teams' sales performance afforded them an occasion to exercise influence with managers in the company's upper echelons – managers that could do much for Desk Sales Managers' careers at E-Tel. There was also pride to be had from leading DeskSales' top Desk Sales Team and shame in leading those Desk Salespeople that lagged behind. It was to Desk Sales Managers' advantage that Desk Salespeople

used Siebel to report ownership of, or involvement in sales for which they had done little, if any work.

Field salespeople had sales targets of 20 million dollars and above. Desk Salespeople's sales targets of 350,000 dollars were little more than 1% of this figure. Field salespeople had thus very little to lose for allowing Desk Salespeople to take credit for the part of field salespeople's sales that Desk Salespeople needed to reach their sales targets. Moreover, field salespeople had much to gain for doing so. In return for being allowed to take credit for field salespeople's sales, Desk Salespeople took on a number of field salespeople's menial tasks, including keeping Siebel sales' records updated and doing the bulk of field salespeople's customer service. Desk Salespeople were thus not only allowed but encouraged to use Siebel to report ownership and involvement in sales for which they did little or no work. Also, under Mariah's tenure, Desk Sales Managers had the responsibility of preparing reports on their Desk Sales Team's progress in reaching their sales and saleswork targets. This turned reporting into an occasion for compliance. As Josh's audio-call shows, when preparing their weekly reports, Desk Sales Managers had their Desk Salespeople log the number of customer calls they needed to reach their weekly saleswork target. At DeskSales, Desk Sales Managers were evaluated based on the reports they themselves prepared. Desk Sales Managers thus had the opportunity to focus on using Siebel to represent compliance with bureaucratic rules, roles and processes instead of enforcing these on their Desk Salespeople.

Opportunity and motive explain why Desk Sales Managers addressed their experience of the bureaucratic push as by interpreting as a pressure to represent compliance with prescribed rules, roles and processes without extending these to their Desk Salespeople. We still need an explanation of how Desk Sales Managers were able to create and maintain this representation.

The two different experiences of the first-line manager's dilemma created by the two General Managers that headed DeskSales generated two different sets of tactics to use information technology to create a representation of compliance with prescribed rules, roles and processes.

Carmen offered a weak experience of the first-line manager's dilemma. Her sales targets were demanding but easy to achieve because she only required a plausible account of Desk Salespeople's involvement in a sale as proof of their contribution to that sale. Desk Salespeople were motivated to achieve those targets because of Carmen's "who wants to be a millionaire" incentive. Desk Salespeople were able to reach their sales targets because of their trading arrangements with field salespeople. Saleswork targets were demanding but not enforced and thus Desk Salespeople's consistent failure in reaching them was of no practical consequence.

Desk Sales Managers drew on two types of tactics during Carmen's tenure. First they legitimized their Desk Salespeople's representations of sales in Siebel. Desk Sales Managers created narratives of their Desk Salespeople's involvement in large sales. Those narratives gave credence to the representation of that involvement in Siebel. This tactic is, to an extent, the opposite of what would be expected from first-line managers helping their employees to deviate from their prescribed rules, roles and processes. On such occasions, first-line managers' role is typically to hide their employees' actions from the scrutiny of upper-level managers. At DeskSales, under Carmen's leadership, Desk Sales Managers role was different. They narrated deviations as compliance with bureaucratic rules, roles and processes.

Second, Desk Sales Managers helped their Desk Salespeople with representing compliance with saleswork targets without engaging in saleswork. Contrary to much of the literature on workplace deviance, at Desk Sales, Desk Sales Managers not only tolerated deviant behavior but also encouraged and enforced it. Under Carmen's tenure, none of the documented

practices of first-line managers' behavior were visible at DeskSales. First-line managers were seldom in the unit. They did not supervise or enforce sales, saleswork or their representation. Instead they participated in the creation of a thin façade of compliance. That allowed their Desk Salespeople to earn Carmen's ad-hoc rewards without engaging in the sales or saleswork that incentives and bonuses were intended to motivate.

Mariah's policies and decisions created a stronger version of the first-line manager's dilemma. Mariah's targets were difficult to achieve and had to be reached in a shorter amount of time. Desk Salespeople no longer had a single broad sales target, but two different targets for "created and owned" and "involved" sales measured by Siebel-level criteria. Siebel was also used to measure Desk Salespeople's saleswork performance. This increased bureaucratic push affected the improvisational pull directly. Desk Salespeople had to exert more effort to reach their sales and saleswork targets. Desk Salespeople varied on the motivation to exert such an effort. Moreover, Mariah's measurement for ownership and involvement in sales created a conflict between field salespeople's and Desk Salespeople's interests, reducing Desk Salespeople's ability to draw on trading arrangements with field salespeople to reach their sales targets.

Under Mariah's leadership, Desk Sales Managers took on some of the supervisory practices that are documented in the literature on information technology and organizations. A closer inspection of Desk Sales Managers' practices reveals important distinctions. Much like first-line managers in other studies on the use of information technology to supervise work (e.g., Orlikowski, 1991), Desk Sales Managers monitored their Desk Salespeople's work and enforced sales and saleswork targets. However, instead of monitoring Desk Salespeople's sales and saleswork, Desk Sales Managers monitored Desk Salespeople's use of Siebel to represent sales

and saleswork. Instead of enforcing saleswork and sales, Desk Sales Managers enforced the use of Siebel to represent work in both areas, even if that meant telling their Desk Salespeople to report sales and saleswork that they had not engaged in.

Mariah's bonus and incentives rewarded the use of Siebel to represent sales and saleswork, but both bonus and incentives were only paid quarterly, were difficult to understand and were often miscalculated. Desk Sales Managers improvised a set of rewards to have a more direct effect on their Desk Salespeople's reporting work. When the ability to report sales and saleswork targets was at stake, Desk Sales Managers advised their Desk Salespeople on how to find revenue to report as the outcome of their own saleswork, instead of helping them improve their ability to sell and their ability to talk to their customers.

During Mariah's tenure, Desk Sales Managers thus created a parallel set of prescribed roles, rules, procedures and rewards that allowed them to manage their Desk Salespeople's representation work. Desk Sales Managers did not manage the customer service and field salespeople service tasks that constituted their Desk Salespeople's everyday work.

Desk Sales Managers' practices suggest that first-line managers can address their experience of the first-line manager's dilemma in two ways. One is the adaptation or "substantive" pattern described in existing studies of information technology and organizations. In this pattern, first-line managers interpret their role as enforcing their unit's formal goals and its formal roles, rules and procedures. They attempt to impose the bureaucratic push on their employees to avoid the sanctions resulting from the immediate visibility of any deviant action to upper-level managers.

The other is the façade-creation or "representational" pattern described in this study. At DeskSales first-line managers interpreted their role as that of creating a representation of

compliance with their team's sales and saleswork targets. Desk Sales Managers also ignored any elements of the improvisational pull that did not directly shape their Desk Salespeople's representation work. Desk Sales Managers only monitored, enforced and rewarded their Desk Salespeople's representation work. When Desk Salespeople lagged behind their targets, Desk Sales Managers did not help them increase their proficiency in sales or saleswork. Instead, Desk Sales Managers helped Desk Salespeople find ways of reporting more sales and saleswork in Siebel without having to engage in either type of task. In a nutshell, in the "representation" pattern, first-line managers enact the disconnect between work and its formal representation in prescribed information systems by focusing their efforts in managing the representation of compliance with prescribed roles, rules, procedures and goals, instead of managing their employees compliance with those prescribed elements of their organization.

CONCLUSION

The first-line manager's dilemma is a common theme in both empirical and theoretical accounts of bureaucracy. These accounts show that first-line managers can address this dilemma by enacting tactics that can range from an imposition pattern – thus yielding to the bureaucratic push – to an adaptation pattern, yielding to the improvisational pull. The literature on IT and organizations has argued that in context of computer-mediated supervision only an imposition pattern is sustainable.

Desk Sales Managers' experience shows that in contexts of computer-mediated supervision there is still plenty of room to yield, even if only partially, to the improvisational pull. The way E-Tel's upper-level managers used Siebel to supervise Desk Salespeople's work suggests that the assumption of tight coupling between employees' action and its representation in formal information systems is not empirically universal. The disconnect between Desk

Salespeople's work and its representation in Siebel allowed Desk Sales Managers to interpret the bureaucratic push as a push to create a representation of compliance. Desk Sales Managers limited their imposition of prescribed roles, rules, procedures and goal on their Desk Salespeople to the creation of a representation of compliance with DeskSales prescribed goals. Desk Sales Managers interpreted the first-line manager's dilemma at DeskSales as a problem of managing their employees' representation work, instead of their sales and saleswork. To this end, Desk Sales Managers created a parallel set of prescribed rules, roles and processes to manage their Desk Salespeople's representation work.

Desk Sales Managers' experience with the first-line manager's dilemma underscores the need to take research on information technology and organizations one step back. The façade-creation pattern at DeskSales is but one of the possible sets of practices with information technology that can be enacted by first-line managers. It is but a first step towards a theory of the use of information technology in relationships of authority. It is, however, an important first step. Desk Sales Managers' façade-creation tactics show how first-line managers can use the very resources that their own upper-level managers put at their disposal with the purpose of quenching employee deviance, to engage in deviant behavior themselves. First-line managers are able to successfully reach their targets and be rewarded and promoted for doing so by managing their employees' representation work while ignoring the tasks that constitute the bulk of their everyday work.

What are the consequences of the façade-creation pattern for this everyday work? How do employees accomplish their everyday work without being helped and coordinated by their managers or by formal processes, rules and roles? The next two chapters address the temporal

coordination challenges and the unprescribed cooperation challenges that this pattern created for Desk Salespeople's everyday service work.

CHAPTER 5:
SHOUTING CUSTOMERS, TO-DO PILES AND THE SELF-COORDINATION OF
UNPRESCRIBED WORK

INTRODUCTION

Desk Sales Managers' tactics to address the tension between the push to enforce sales and saleswork targets and the pull to adapt to their Desk Salespeople's low skill and will to sell had consequences for Desk Salespeople. Desk Sales Managers addressed this tension by enforcing representation work on Desk Salespeople. Desk Salespeople had to engage in a considerable amount of service work to be able to create the representation of compliance with sales and saleswork targets that their Desk Sales Managers enforced. This service work included a large amount of low complexity tasks and a smaller set of complex service issues. This mix of service work created three self-coordination challenges for Desk Salespeople: remembering their outstanding service tasks, remembering the information needed to complete each of these tasks, and prioritizing among them. This chapter explains how Desk Salespeople were able to address each of these three challenges without the prescribed organizational elements that are designed for these three purposes: the authority relationship, prescribed work procedures and a prescribed information system.

Desk Sales Managers instructed Desk Salespeople to use Siebel to create a representation of compliance with sales and saleswork targets. Desk Sales Managers rewarded Desk Salespeople who created this representation and punished those that failed to do so. Complying with saleswork targets posed no major difficulty for Desk Salespeople. It was just a matter of

putting the effort to use Siebel to report seven calls to customers a day. Using Siebel to create a representation of compliance with sales targets was much more challenging. Desk Salespeople needed field salespeople's permission to report some of field salespeople's sales as their own. Alternatively, Desk Salespeople could get customers to place orders to them instead of placing them to service units. Desk Salespeople could then report these orders in Siebel as their own sales – contracts the customer signed because of Desk Salespeople's efforts instead of customers' decision to renew services or upgrade equipment. Both of these sources of sales for Desk Salespeople to report as their own required Desk Salespeople to engage in service work. Field salespeople routinely received service requests from customers. Field salespeople passed these service issues to E-Tel's service units, but customers called field salespeople, not service representatives, to be updated on their service issues. Early in their relationship with field salespeople, Desk Salespeople offered to take over the management of customers' service issues. Desk Salespeople's motivation to make this effort was twofold. First, as I explained in the account of Desk Sales Managers experience of the first-line manager's dilemma, Desk Salespeople traded the effort needed to manage customers' service issues for field salespeople's permission to report some of field salespeople's sales as their own. Desk Salespeople's target of \$350,000 in sales was less than one percent of field salespeople's sales target – a small price to pay to be rid of customers' calls asking for updates on their service issues. Second, Desk Salespeople also offered to take on field salespeople's service work because this increased their opportunities to be the person their customers called to place orders – the same rationale behind Desk Salespeople's attempt to get their customers to call them directly for service issues. These tactics to obtain visibility of sales and orders and to earn the permission to report these as their own sales kept Desk Salespeople supplied with a constant stock of outstanding service issues.

DESK SALESPEOPLE'S SERVICE WORK

Desk Salespeople's service tasks could be classified in four types, depending on the task's complexity and its duration. Low-complexity/short-duration tasks were isolated service issues. These issues were often urgent but did not present any particular difficulty for Desk Salespeople. Low-complexity/long-duration service tasks were often part of a large back of service work which also presented little if any difficulty for Desk Salespeople. High-complexity/short-duration tasks were serious equipment or service faults, or urgent information requests. Finally, High-complexity/long-duration tasks were large scale changes to customers' information and communication infrastructure, requiring Desk Salespeople to step in a role akin to that of a project manager. Tasks with different durations and levels of complexity created different self-coordination challenges.

Desk Salespeople attempted to find a niche for themselves in their account teams by engaging in a **low complexity and long duration** task which allowed them to have frequent contact with their customers and find a continuous stream of small orders that they could log on Siebel as the outcome of their own saleswork. At the time of my research, E-Tel was launching a DSL internet service and field salespeople had been able to sell this service to a number of their accounts under the guise of a work-from-home benefit to middle managers. The implementation of a DSL connection required contacting each customer's middle manager individually, setting up an installation appointment time and following up to check that the installation had proceeded without problems. Desk Salespeople took over these tasks because they could claim the revenue on their own and because they were able to interact frequently with their customers' managerial ranks. One morning, as I joined Mark, one of the older Desk Salespeople in the unit, at his desk

he had a spreadsheet with a list of people who had been designated to receive DSL by one of Mark's customers decided to buy DSL. As with all such lists that I had seen at DeskSales, this one was color coded, but only cells in the 'name' and the 'installation date' columns were colored. Most were green, which meant that the installation had been done, but others were red and yellow. Mark explained that in his case, "I am managing DSL from the desk." Mark told me that the reason for that is "I need to see what's going on in the account," and it also "provides me an opportunity to speak with very senior management, people to whom I wouldn't have access in many circumstances." He continued, "they can mention my name within the company and people will know who I am."

Although tasks such as managing a DSL rollout were simple, their extended duration and their multi-stage nature created self-coordination challenges. Desk Salespeople needed to keep track of the progress of such tasks through time and keep a record of the customer information needed to complete these tasks. The long duration of these tasks required Desk Salespeople to devise a set of rules to prioritize the rest of their service work around them to be sure that customers did not experience delays in service.

Most Desk Salespeople tasks, however, were of **short duration and low complexity**. These tasks included processing small orders, passing fault reports to service units and finding how much progress service units had made in addressing customer problems.

Desk Salespeople did not have much to gain by engaging in these simple, short term tasks. The orders they took from customers were generally low in value and thus had little, if any impact on their revenue targets. Faults, problems and update requests were received via email and thus afforded little opportunity of contact with customers. Nonetheless, Desk Salespeople could lose much if they did not engage in these simple, short term tasks. Occasionally, these

tasks involved senior managers at Desk Salespeople's customers whose dissatisfaction with a DSL installation or a phone installation could jeopardize their willingness to favor E-Tel over its competitors in large deals. For this very reason, Desk Salespeople treated these simple, sort-term tasks very seriously although they found this type of service work to be somewhat menial.

Lena, a young Desk Saleswoman, faced such a situation while she was assigned to one of DeskSales larger accounts. She received an email from her field salesperson saying that the mother of a senior executive at their customer was changing phone numbers and that the executive's mother wanted her old number to answer with a message giving her new number. Lena called her service center and, after a long wait, she was told the price and the requirements for this option. Lena jotted this information on her notepad. The service representative told Lena that she had to call the residential customers' service center to find all the required information on the executive's mother old and new phone numbers for which she needed to order the number change messaging service. She wrote all this information on an email to her field salesperson and, after sending it, said that "our job, really, is to keep customers happy, especially at the top level so that when they want to do large purchases they come to [E-Tel] and so that the [field] salespeople can go in and deal with the big sales." She concluded, "we [Desk Salespeople] are not here to dig big sales, that's the [field] salesperson's role, I don't even try because I'd just look silly."

Desk Salespeople's challenge in coordinating these tasks across time was not related to each individual task. Instead the challenge lay in the volume of such tasks that Desk Salespeople received daily. When asked how he decided what to do each day, a Desk Salesman explained:

It's as things come in, it's an ongoing thing, [... but] it's too much, I can't deal with everything at once. Will I ever finish one thing?

Another Desk Salesman reported:

I should plan, but I never have. [...] Normally I'm driven by email. If I want to do something, I'll leave the email in the inbox. I don't really [know what to do first]. It's just, I'd rather do that and then I'll be doing it, and 'shit, I forgot to do that.' It's quite the panic but it's organized chaos.

This uneven, non-stopping flow of simple short-term tasks created a perpetual backlog of this type of service work. Desk Salespeople needed a way to keep track of all these simple, short term tasks that they had to do, keep a record of those that were completed and find a way of assigning a priority to each of these tasks.

Occasionally, customers or field salespeople sent Desk Salespeople **complex problems** and requests that had to be addressed in a **short amount of time**. This type of problem or request typically included pricing complex sets of products and services, and dealing with serious equipment and service faults.

Desk Salespeople had much to gain by addressing these problems and requests. Successfully dealing with a customer's problem allowed Desk Salespeople to earn their customers' trust and to show their value to the field sales team.

Simone, one of the most experienced Desk Salespeople in the unit, went through such an experience when she received a fault report in one of her customers' main payment servers. Simone received a telephone call from an IT manager in a large television channel complaining that their cell phone payment system was off-line. Simone was able to persuade an E-Tel service representative to move a backup server that E-Tel had stored in another customer's premises to her customer and program it to work as a cell phone payment server. Some time later, Simone received a praiseful email message from this customer, which was cc'd to Daniel, Simone's Desk Sales Manager. Daniel announced this message in one of his team's audio-calls. He asked Simone to read the electronic mail but Simone was reluctant. People on the team insisted and Simone read a couple of lines, "we no longer call her Simone, we call her 'ray of sunshine'."

People asked her to read more and Daniel replied, "there's no need, I just forwarded the electronic mail to everyone on the team." Among cheers of "that's brilliant," "that's fantastic," Daniel said "this kind of stuff is worth its weight in gold. Whenever you get a message like this, let me know." He added, "there are two parts to our job, customer service and sales and when we get this kind of stuff from the customer we really need to shout about it." The other Desk Salespeople on Simone's team read the message and Lena said, "That's a brilliant bouquet, 'living the E-Tel values!'"

Additionally, if Desk Salespeople were able to price a complex set of products and services for their customer, the customer placed the order through their Desk Salesperson instead of going through the account team or through E-Tel's service units. Desk Salespeople could then report this order as the outcome of their own saleswork without having to persuade their account team or their service units to allow them to do so.

Although this type of request or problem was short lived and infrequent, it also posed coordination challenges. Tasks of this type required gathering information from a number of different systems and databases. Desk Salespeople needed a way to record and store all these pieces of information in one system, to able to access them at a glance and give the proper instructions to service units or give all the necessary information to a customer. When Desk Salespeople received more than one complex problem or request – an infrequent but not rare occurrence – they also needed a way to record these problems and requests and prioritize among them.

Desk Salespeople occasionally got involved in **complex tasks** which **extended across time**. These tasks involved significant changes in customers' information and communication technologies and systems, such as company relocations and call center installations. Karin, one

of DeskSales' most experienced Desk Salespeople, spent two months working on the relocation of the headquarters of one of her two accounts, a Big Six accounting firm. The amount of daily work that Karin had to do for this relocation varied across those two months. There were days when she only checked E-Tel's information systems to see if all the different processes related to her customer relocation were on-going and on time. On other days, Karin spent most of her workday filling order forms and pricing products required for the move. On most days, she was on the phone with many of E-Tel's service units, arranging equipment relocation, number porting¹³, and equipment deliveries.

These tasks often involved a large value in equipment and service orders, which Desk Salespeople could report as the outcome of their own saleswork, in exchange for doing all the work needed to place the orders for this equipment and for these service engagements.

These long-duration/high-complexity tasks were very difficult to coordinate. They included a large number of activities, some of which were highly complex, involving multiple service units. Desk Salespeople had to gather information about all the necessary activities to carry out this type of task successfully and record that information in a way that allowed Desk Salespeople to track what they had accomplished and what was yet outstanding. Desk Salespeople also needed a process to prioritize these tasks and a way to update their customers on their progress.

The four types of service tasks that Desk Salespeople engaged in generated three broad self-coordination challenges: remembering their outstanding tasks, remembering the information needed to carry out those tasks and prioritizing among those tasks. Desk Salespeople received more service work than what they were able and willing to accomplish each day. This meant that

¹³ Number porting allows companies and individuals to change phone lines (as when moving to a different geographic region) without changing phone numbers.

Desk Salespeople needed to keep some sort of record of the service work they had yet to complete. Moreover, even the simplest of Desk Salespeople's tasks required multiple pieces of information, often spread across multiple information systems. This information could include anything from customer contact details, the equipment and software that customers had installed, the description of the service problem or request and other details submitted by the customer. Desk Salespeople needed to keep a record of this information that was accessible when customers or service units called about each specific service issue. Finally, the amount of service work that Desk Salespeople had to engage in required some process to answer the question, "what should I do next?" Desk Salespeople needed a process to prioritize their service work.

DESK SALESPEOPLE'S SELF-COORDINATION PROCESSES

The three self-coordination challenges that Desk Salespeople had to address are not new to the literature on coordination. This literature has documented how organizations can design and implement authority relationships, information systems and work procedures to address employees' self-coordination challenges. At DeskSales, Desk Sales Managers paid little if any attention to their Desk Salespeople's service work. They framed Siebel as a reporting tool and they did not design or implement any prescribed procedures to aid Desk Salespeople coordinate their service work across time. Desk Salespeople used a set of three artifacts – to-do lists, to-do piles, and running logs – to scaffold the coordination of their own service work across time, while relying on customers to prioritize that work.

Desk Salespeople prescribed self-coordination mechanisms

Desk Salespeople had a set of prescribed self-coordination mechanisms – prescribed procedures, Siebel and their authority relationship with their Desk Sales Manager – to accomplish their prescribed work as salespeople. These resources were of little if any avail to help Desk Salespeople coordinate their own service work.

Prescribed procedures were of little if any avail to Desk Salespeople when attempting to address the self-coordination challenges created by their service work. The prescribed procedures available to Desk Salespeople were based on their prescribed sales role and thus of little, if any use to their service work. The three self coordination challenges that Desk Salespeople faced were part of the reasons that Siebel was implemented at DeskSales. Desk Salespeople’s first coordination challenge – keeping a record of their outstanding tasks could be addressed by using Siebel’s “activity management” module. This module displayed outstanding tasks as a task-list arranged by priority as a more detailed description of each task. Exhibit 5.1. shows a Siebel screen with a task list, Exhibit 5.2. shows a single task record.

Siebel thus provided users with a system that gave them visibility of their outstanding tasks at a fine and at a coarse level of detail. Siebel could also be used to keep the information needed to accomplish each service task, including the customer’s name and contact details, a description of the problem or request, product and service references, and other details such as the type of equipment the customer had on premises and the type of maintenance contract the customer had signed with E-Tel. Siebel’s individual activity records had a free-form “comments” field where users could enter any information in text form. Additionally Siebel allowed users to embed any electronic document in an activity record (in Exhibit 5.2., the user attached a PDF file with an application manual).

Exhibit 5.1. – A Siebel task list screen.

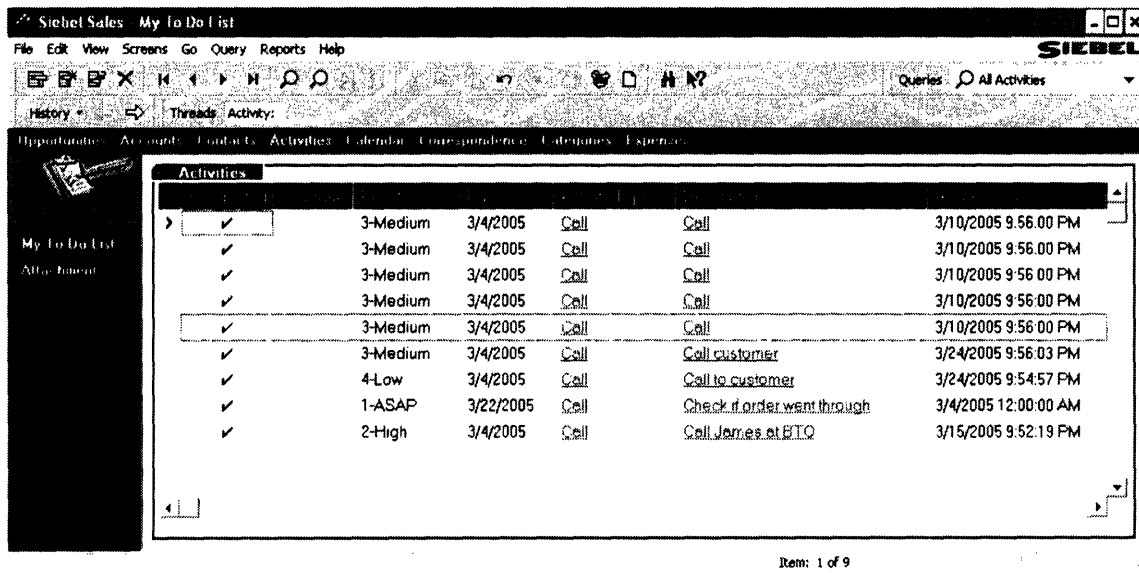
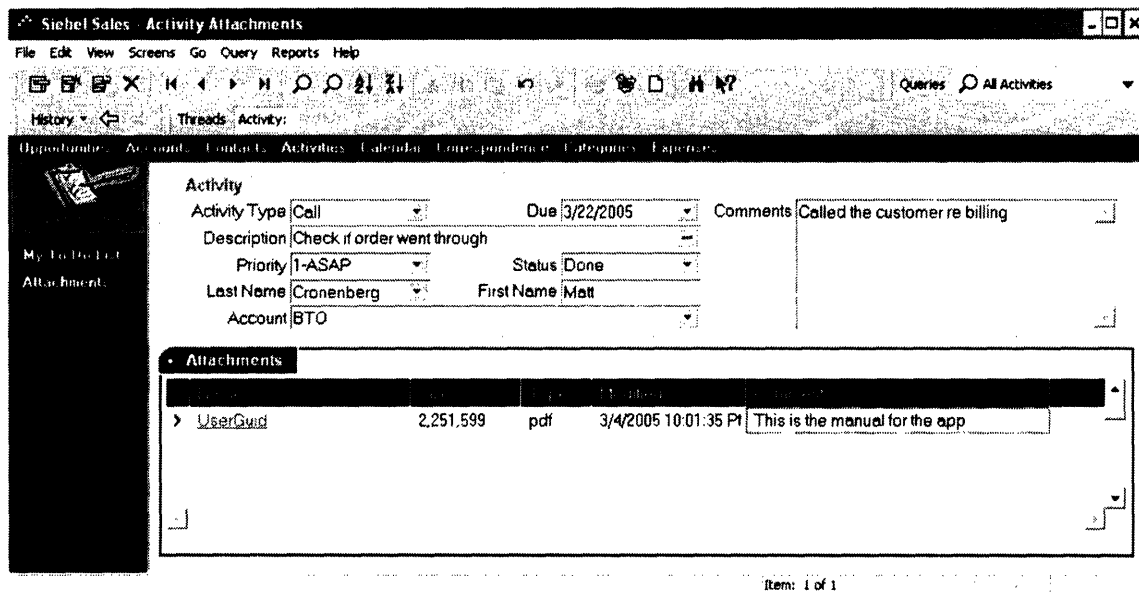


Exhibit 5.2. – A Siebel task record screen.



This allowed users to keep any type of information related to any activity in a single place. Siebel activity records also included pre-designed fields, such as the customer name and the sale the activity was related to. Selecting either field would bring the full customer contact

record or the full sale record, when Desk Salespeople needed this information to complete their customer service tasks.

Siebel could also be used to address the third and final self-coordination challenge that Desk Salespeople faced: decide the order in which they were going to engage in each of their outstanding tasks and keep a record of that order. Siebel allowed users to assign one of four levels of priority to each of their tasks. Tasks could then be sorted according to priority and assigned to a reminder to prompt Desk Salespeople to start or finish their tasks (see the “priority” column in Exhibit 5.2.).

Desk Salespeople, however, did not use Siebel to address the three self-coordination challenges they faced when engaging in service work. Desk Salespeople enforced the use of Siebel to produce a representation of compliance with sales and saleswork targets. This led Desk Salespeople to interpret Siebel as separated from their actual service work. When asked how he felt about Siebel, Gregory, a Desk Salesman in one of the Technology and Media teams replied:

Siebel is... Siebel [sigh] If Siebel was used correctly, you're going to be surprised that I'm saying this, if Siebel was used correctly, I think it would be an absolute nightmare [laughter]. Because it would take up so much time [laughter]. If Siebel is being used correctly, every call you make, you have to do a contact, and do an opportunity and then write notes on that activity. [...] So the time involved in doing it correctly and the information that's on Siebel in theory works very well, but in practice, if done correctly [laughter]. Do you see where I am coming from? Yeah... It's a reporting tool and a reporting tool only, and this is why I'm amazed we're paid off a reporting tool. I am amazed that I am paid off a reporting tool.

Siebel was an information system that represented managers' interests, not those of employees. It was not Desk Salespeople's tool, but managers' – and thus not a legitimate resource for improvisation.

Desk Sales Managers offered little, if any more help than prescribed procedures and Siebel in Desk Salespeople's self-coordination challenges. In their team audio-calls, Desk Sales Managers not only motivated and enforced representation work but also made Desk Salespeople aware of the extent to which DeskSales General Manager and E-Tel's senior managers used

Siebel to supervise that work. However, when asked to describe their Desk Sales Manager's management style, Desk Salespeople unanimously replied, "hands off." Ron, a Desk Salesman in the team with the least experienced Desk Sales Manager described his sales manager in a positive tone:

I am very happy with my manager at the moment. He happens to be a friend of mine for the last three years, but, yeah very good, everyone else is very happy as well. There were a few things at the beginning but now everyone is happy. Very kind of a hands off approach he has. He stands back and lets people get on with things but all the relevant information is passed on and all the things that need to be done are done. So yeah, very good.

George, a Desk Salesman in the team with the most experienced Desk Sales Managers in the unit complained that Desk Sales Managers had no choice but to adopt a non directive style:

[Desk Sales Managers] are boss[es] in the terminology but I don't see them acting as boss because they have so much clerical work to do themselves. [...] All these reports, there are all those reports they have to produce for management for that or the other, so I don't see that they come across as bosses and they don't have enough time to be a boss although the boss is in the title, they have a lot of work put on them by their own bosses, by their own superiors as well because of all the reports that need to be written, so they have to spend a lot more time doing that than actually being proactive and run the sales team. So the vast majority of the sales teams stand on their own two feet.

Desk Sales Managers focused on supervising representation work, not the customer service activities that Desk Salespeople considered to be their "real work." Frances, a Desk Saleswoman, explained the difference between Nina, her Desk Sales Manager and her field salespeople as follows:

I suppose I consider Nina my direct manager, but I'd say I answer to the [field sales] team, really. Although Nina is there if I'm late for work and things like that, for the bread and butter things, do you know what I mean, the actual content of my work, it's my account team, Nina wouldn't notice if I actually did anything. But ultimately, [the field sales team] I would say, is the people you have to please if you want to get any work, and make any bonus.

Moreover, Siebel was customized to their prescribed role: selling. Therefore there was no official or formal system that Desk Sales Managers could use to supervise Desk Salespeople's service work. Furthermore, Desk Sales Managers did not attempt to supervise Desk Salespeople's service work informally. Desk Sales Managers were never present when Desk Salespeople met with their field salespeople, although a relationship with their Desk

Salespeople's account teams would allow Desk Sales Managers to have informal visibility of their Desk Salespeople's service work. When Desk Salespeople were first assigned to their field accounts, field salespeople came to DeskSales to meet their Desk Salespeople and go over their account development plan together. The protocol for this visit included a meeting between the Desk Salesperson's Desk Sales Manager and field salespeople so that the Desk Sales Managers could go over the account development plan, approve it and sign it. In practice, Desk Sales Managers told their Desk Salespeople to keep copies of their account development plans for Desk Sales Managers to sign in bulk. Desk Salespeople were also reluctant to discuss the details of their relationship with their field sales teams, thus hindering any informal supervision over their customer service work.

Coordinating service work across time

Unable to rely on their supervisors and their prescribed information system, Desk Salespeople had to improvise their own processes to keep a record of their outstanding service work. Desk Salespeople used their own improvised system to keep track of their customer's service work and store the information needed to complete it. Each Desk Salesperson improvised an information system which was tailored to their own preferences and to the type of customer service tasks they engaged in more frequently. However, all of Desk Salespeople's improvised information systems were based on three different types of material artifacts: to-do lists, to-do piles and running logs.

To-do list

Desk Salespeople used a to-do list to record their outstanding tasks in an index format. To-do lists were adapted to each Desk Salesperson's personal preferences. To-do lists could be

compiled in a single document, such as a page in a notebook, a page in a calendar or a loose sheet of paper (see Exhibit 5.3. for a notebook page), which were often placed between the Desk Salesperson and their computer keyboard. Alternatively, to-do lists could be distributed across multiple documents, often as a number of post-it notes on Desk Salespeople's desks and around their computer screens, but also as jottings on any scrap of paper at hand, from credit card receipts to shopping vouchers (Exhibit 5.4. below shows a how Desk Salesman placed post-it notes on their desks, Exhibit 5.5. shows two post-it notes taken from a Desk Saleswoman's screen).

Independently of the format of their to-do lists, Desk Salespeople used them to have visibility of all their outstanding tasks without having to rely on their memory and without being distracted by the details of those tasks. Alexander, one of the most experienced Desk Salespeople at DeskSales, used a numbered to-do list that he kept on a loose sheet of paper. The following is a 10-minute slice of a day in Alexander's work that illustrates how Desk Salespeople used to-do lists.

Alexander got a call from a customer asking about an escalated order. Alexander said that he would call the person that was handling it and get back in touch with the customer. He jotted it down on his to do page "25) Paul – Circuit Escalation." He then looked at his to do list. Item 19, had a "4" in front of it, which reflected its priority. Alexander wrote "do later" in front of it.

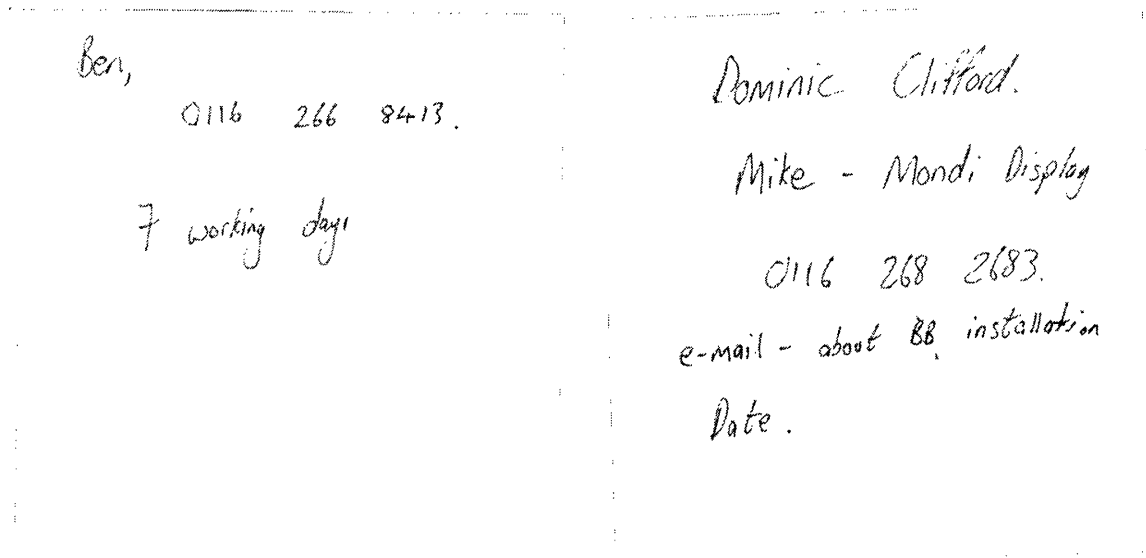
He then looked at item 20 on his to do list, which had a "5" in front of it, indicating priority and opened an email which was a thread of discussion between the customer and the field salesperson on a DSL availability issue. Alexander said that he didn't understand why he had been involved. He said that it was plain that the service person had made a mistake. He wrote that in an email to his field salesperson.

He then picked up a letter from UNICORP with a check from a pile of paper on his desk. He said that UNICORP sent it to the wrong person (himself). He called UNICORP's accounting department, and told them that they were sending their payment to the wrong address and that he had the correct address for them. He then got up and mailed the customer check and letter of payment to the correct billing address. He comes back and scratches another item on his to do list (24) Send UNICORP CHQ, "another one bytes the dust!"

Exhibit 5.4. – Post-It notes on a Desk Salesman’s desk.



Exhibit 5.5. – Two Post-It notes from a Desk Saleswoman’s computer screen.



Alexander’s use of his to-do list highlights three aspects of Desk Salespeople’s use of this type of artifact to keep a record of their outstanding tasks. The first is how they used this artifact throughout the work day. Desk Salespeople added and removed items from the list as they received and completed service tasks. This allowed Desk Salespeople to be able to quickly assess the amount of service work that they had completed and the amount of service work that they had yet to carry out. The second aspect of Desk Salespeople’s use of their to-do lists was the ‘index’ nature of this artifact. The description of each service task was very short – “Paul - circuit escalation” – which highlights that these artifacts were used to scaffold memory of outstanding service work, not to keep a detailed record of it. The third aspect of Desk Salespeople’s use of their to-do lists was to enact a sense of progress through the large amount of service tasks that they received day in, day out. To-do lists were thus not only used to scaffold the memory of what needed to be done but also the memory of what had already been done.

Alexander accounted for his use of his to-do list as follows:

It's an on-going thing. Every morning I've got it there, so every morning I'll write a new one. There will be old stuff there that is ongoing and that I haven't done yet, which is kind of at the top. I will go through emails and messages that come in overnight. Add them to the list, then I'll prioritize the things that I have to do through the day. I then I go through it. Phonecall comes in, add it to the list, email comes in, add it to the list, it's just kind of an always on-going never ending list.

Alexander's description of how he used his to-do list highlights that Desk Salespeople improvised a set of procedures to structure their use of their to-do list down to the position of records of tasks in the list. To-do lists were thus structured-in-use providing Desk Salespeople with a material resource to scaffold their progress through their service tasks.

To-do pile

Desk Salespeople used a set of printed and annotated emails that aggregated detailed information about Desk Salespeople's complex customer service tasks). As with to-do lists, Desk Salespeople's to-do piles had different formats. To-do piles took two main shapes. One was that of a pile of annotated printouts kept in a folder or drawer in Desk Salespeople's desks. Exhibit 5.6. shows a Desk Salesman using his to-do pile. The other shape that a to-do pile took was that of multiple "piles" kept in a set of binders organized by account (see Exhibit 5.7.).

The following vignette illustrates how Jeremy, a Desk Salesman who had joined DeskSales right after graduating from high school, used his to-do pile:

As he sat at his desk, Jeremy turned on his computer and picked up a pile of annotated printed emails from the top drawer of the drawer box on his desk, "this is my to-do pile," he announced. Jeremy then opened his email software. He had an email from a customer asking for a quote for a complex private circuit. Jeremy spent a few minutes reading that email and then said that instead of scrolling up and down, he was just going to print the email so that "the products are easier to find." He went to pick the email up from the printer and, when he came back, he put the email printout at the bottom of his to-do pile. He then went through all the printed annotated emails in his to-do pile, He put some emails to the side "I have to do that this afternoon," "this relates to that," "I need to find out what's going on about that," "I've dealt with that" (he ripped the printed email message it and put it in the trash can), "this is one I've done": "see I do go through my list and get it done, just not as quickly as I'd like." Jeremy put a couple more printed emails on the trash can and said: "my to-do list is now manageable." He put all the remaining emails in a neat pile to the far right side of his desk and picked up the one that he got today with an order for several products. He did the calculations for ISDN prices next to the ISDN product description on that email. Jeremy then sent an email with this ISDN order to the ISDN specialist service unit.

Jeremy pushed his keyboard against his computer screen and, before he got up to go to lunch, said "I don't particularly like paper but it's a bloody good reminder, and sometimes things go so far back that you need a good reminder." He added that the two things paper is good for is

that things are easier to find – "you don't need to scroll up and down" – and "you can also take notes on them." He explained that he could take notes on printouts because on email the notes are at the end of the email, not next to the information they refer too.

Jeremy's use of this to-do pile illustrates three core features of this artifact as a resource to scaffold Desk Salespeople's self-coordination of their service work. One of the most interesting features of this artifact was its hybrid nature. Desk Salespeople used to-do piles to keep a record of all the information they needed to complete a task. This information was collated from multiple sources, including E-Tel's information systems, phone conversations with service representatives and with the customer, and electronic communication systems. To-do piles thus allowed Desk Salespeople to have an at-a-glance access to all the information related to each of their service tasks.

The second feature of to-do piles was that of being a task-specific, material cognitive resource. To explain, Jeremy's use of his customer's email to calculate ISDN prices suggests that Desk Salespeople needed material resources to scaffold some of their activities, such as calculating prices. Desk Salespeople used the printed email messages that constituted their to-do pile for this purpose. However, they did not do so indiscriminately. Each printed email message was only used to scaffold the activities pertaining to the task that each message referred to.

The third feature of to-do piles was to allow Desk Salespeople to keep track of their progress in completing their service tasks. As Jeremy suggests, the heights of their to-do pile allowed Desk Salespeople to keep track of how much work they had done and how much work they had to do already. In this sense, to-do piles were used much like a to-do list. To-do piles, however, fulfilled a self-coordination task that to-do lists did not. To-do lists only allowed Desk Salespeople to track whether each of their service tasks was completed or not – enough to coordinate their simpler service tasks across time. More complex service tasks, however, often involved a number of activities that also needed to be coordinated across time.

Exhibit 5.6. – A Desk Salesman using his to-do pile.



Exhibit 5.7. – A to-do pile organized in folders.



Desk Salespeople's annotated the email messages that constituted their to-do piles to coordinate these activities. Desk Salespeople could keep track of the activities they had completed for a specific task by looking at the traces of their action in printed emails (such as calculations, in Jeremy's case) or by using notes to tag the completion of each specific activity.

Although for most Desk Salespeople, their to-do pile was an actual physical pile of annotated printouts, there were a few Desk Salespeople who experimented with an electronic version of this artifact. In electronic format, a to-do pile was composed of electronic mailboxes, more specifically Desk Salespeople's email inbox and outbox. Email messages were annotated by using flags – which allowed Desk Salespeople to color-code messages – and by editing subject lines to include a reference number. Casey, a Desk Salesman who used his email software as his to-do pile for two months explained that his system consisted of “flagging” items in his inbox and outbox. He described his color coding scheme by saying that messages “flagged” red meant “this is me asking people to do stuff” and that messages “flagged” white “is when people actually do it.” He further said that “I litter everything with reference numbers, it's a bit of information overload but that means that I cannot ignore it, even if I want to.” Whereas Desk Salespeople using paper-based to-do piles recorded phone conversations as annotations on the printed emails that made up their to-do pile, Desk Salespeople that used email as their electronic to-do pile summarized phone conversations in email messages which they sent to customers, service representatives and field salespeople, not so much to communicate but to produce a record of activity. When finishing a call, Toby, a Desk Salesman on one of the Finance teams, told the service representative he was talking to, “I'll send an email for our records because I use [email] as my diary.” After he hung up, Toby went to his email software and wrote a summary of his conversation with the service representative, noting “as much for my records as

for yours, here's a summary of what we discussed." After finishing the email and sending it to the service representative, Toby complained:

The only reason I've done this is so that it goes to my own sent items [i.e. his outbox in his email software]. I'm forced to communicate. [I sent] the email to put it as a record in my sent items. I [had] to send an email I [did]n't want to.

After only a few months of using email as their to-do pile, those Desk Salespeople that used this system reported that it was difficult to keep track of their outstanding tasks without a paper based artifact. Simon, a Desk Salesman on one of the Retail teams, voiced a common concern:

I converted to paper because I couldn't do it anymore [use email as a to-do pile], I was always going through my emails in the back of my mind. I was always afraid that I forgot something.

Independently of their form, to-do piles were used in two ways. They were used as a repository to record and retrieve all the information related to a customer request or problem. Additionally, as Simon suggests, they were occasionally used as a substitute for to-do lists as a record of outstanding tasks – instead of using check marks, Desk Salespeople could use the height of their pile as a measure of their progress.

Running log

Desk Salespeople used two types of running logs. The first was a short-term repository of information – the daily running log – for the tasks that they engaged in during the course of their working day (see exhibit 5.8. for a daily running log). Desk Salespeople used this type of running log to write down telephone numbers, product references, product details and the customer details they needed to carry out their outstanding tasks. The daily running log was kept on a single sheet of paper, often a page in a notebook, that Desk Salespeople placed between themselves and their computer keyboard (see Exhibit 5.9.).

Exhibit 5.8. A Desk Saleswoman's daily running log.

ADSL - for the workplace
 what does our company
 make .5 ip addresses
 asap! ~~9224~~ chocolate
 Comms.Support@

105 with 1/5
 Franklin, Birmingham

07879
 667821
 Silly.Bui at csplc.com
 Cadburyschw7

CSPIC
 Regional IT Centre
 Franklin Howe
 Bourville lance
 Birmingham
 Louise Penton

Bill No
 W20620274

Business 500 plus
 with 5 ip address 0121 451 4356

17, 18, 19, 20, 21

Flag BISK 501 28102
 201-28102
 Suspect

8DB-uQ
 -3EXM4F
 1-3BICQT
 1-2E427Z

84K contact
 AMIBL
 Tweeks

2S2S1
 nosi-602Q1
 nsa-58811

6610205
 58833

162000

Exhibit 5.9. – A Desk Salesman using a daily running log.



The following vignette shows how Scott, a Desk Salesman on one of the Information and Media teams used his running log while engaging in two separate tasks:

Scott received a call from a customer. The customer told him that he needed a toll-free number that people would be able to call from any country in Europe and from the US. Scott jotted down the customer's name and his request in the notepad that he had in front of him. The customer asked how long the quote would take and Scott replied that he was going to do it today.

Scott got an email with an order for a set of virtual private circuits. He jotted down the details in his notepad and then went to the quick quote tool on E-Tel's intranet. He jotted down the prices in front of each circuit's details in his notepad.

After he did all of the circuits, he added them using his desk calculator and jotted the result on the same page in his notepad. He then copied the prices on the sheet of paper and included the site names, product and price. He emailed the customer asking for the term and for confirmation of the site details.

Scott then said that he needed to call the billing department to find out how much the cancelled circuits were worth. He called the billing department and gave them the circuit reference numbers and jotted down on his notepad the billing values he was given. After he finished the call, he grabbed his calculator and added all the prices he was given. He jotted down this total next to the prices he was given during the call.

Scott's use of his daily running log specifies the role that this artifact played in Desk Salespeople's self-coordination processes. Daily running logs scaffolded temporary task memory. Desk Salespeople's used their daily running logs to temporarily store information which was only needed for the duration of their current task, but which was difficult to commit to memory (e.g., phone numbers and addresses).

Desk Salespeople used another type of running log in addition to their daily running log. This log – the task running log – was a record of the activities that a Desk Salesperson had accomplished towards a specific, long-running task. Desk Salespeople used this artifact to keep track of their progress towards long term tasks and to keep track of the outstanding activities needed to complete these tasks. Task running logs often took the form of a Microsoft Excel spreadsheet that was designed for each of the longer running tasks that Desk Salespeople engaged in. Every Desk Salesperson at DeskSales that was doing a DSL rollout created such a spreadsheet to be able to track which DSL installation had been completed, which required more customer information to be completed and which were waiting for the customer to schedule an appointment with an engineer. Bruce was one of the Desk Salespeople who had a large DSL rollout. Whenever his customers' IT department sent Bruce an employee's name and information to put in an order for DSL, Bruce not only filled out the order form that he had to send to the E-Tel service unit responsible for DSL installations, but also entered that information on a spreadsheet that he designed to keep track of the DSL rollouts for his customers (see Exhibit 5.10. for a DSL task running log). Bruce's spreadsheet was color-coded. Completed installations were green, those that required more customer information were blue, those that were waiting to schedule the installation date were orange and those that were recent orders were in yellow. Bruce explained that he color-coded his spreadsheet because "immediately I can see what's

going on.” At the end of his working day, Bruce sent this spreadsheet to his customer “it demonstrates that I am actually trying to deal with this.” He complained that the IT manager at his customer “just likes to know what stage things are at and that I am dealing with it. He’s a funny old man.”

To-do lists, to-do piles and running logs allowed Desk Salespeople to create a ready-at-hand representation of their outstanding tasks. This allowed them to address the problem of knowing which task they had to engage in. However, none of these artifacts was used to decide on task priorities. When facing a to-do list or a to-do pile, how would a Desk Salesperson know where to start and what to do next?

Exhibit 5.10. - A Desk Salesman DSL task running log.

	A	B	C	D	E	F	G	H	I	J
1	Name	Address	Postal code	Phone	DSL Reference	Status				
2	Joe Aheson	13 Victoria Lane		64764 555-453-4324	A-432383	Ordered				
3	Paul Morgan	4563 First Avenue		43432 555-521-3443	A-43943C	Waiting to know address				
4	Amit Singh	43 Broadway, Apt.3R		65432 555-524-4526	A-H57687	Waiting to know address				
5										
6										
7	Amit Singh	43 Broadway, Apt.3R		65432 555-524-4526	A-H57687	Waiting to know address				
8										
9										
10										
11										
12										
13										

Prioritizing outstanding tasks

Desk Salespeople gave priority to the problems or requests of customers and field salespeople who “shouted the loudest.” Kyle, a Desk Salesman on one of the retail teams, explained that customer “shouting” meant:

Getting your attention. There’s something that he needs acted on very, very quickly and he needs our full attention focused in that area for him. [...] If someone is shouting then that will be a pain to me so the easiest thing to do is [to deal with their issue]. [I]f somebody is shouting and I have other things, I can’t concentrate fully or getting caught up in finding information if I know that the next phone call I get will be somebody saying ‘have you done that for me yet?’ so

therefore it's always a case of – I mean, if the customer has got a valid reason to shout that's fine. If he tells me, 'look I need this information, I'm going to get something done in three days, I'll have a decision' then that's fair enough. If he just turns around saying – If he says, 'look, I really messed up, I should have placed this order three weeks ago, I really need some help', that's fine. What I really don't like, is people that shout... I mean, if someone shouts all the time, for everything I get in then that's not... If it's a valid reason to shout, then I'll look at it first.

“Shouting the loudest” was thus both a measure of how visible the customer or the field salesperson was (due to their frequency of contact) and a measure of the importance and urgency of a task (due to the interpretation of the task as “needing your full attention”). Alan, a Desk Salesman on one of the Finance teams, described his technique for deciding which task to do first:

[I have] no technique really. It depends on the person you talk to. It depends on how the email is formulated. If it's my account director and says I want this done by midday and somebody else says I want a quote, you know[, y]eah, I'll do it. If he says, 'I want this to be done by this morning', 'I want this to be done by midday', I'll say 'I'll do my best'. Because I'm not really quite sure of that, I put it in an email and send it. It depends on the type of queries but you obviously can put them in some categories, you know. If your manager says 'I want something done on Siebel now', 'now' doesn't mean in two hours or three hours, it means now. That is a priority. If they tell you, 'I'm going to a meeting, I want this to be done now', it's a priority and you do it. Forget about the rest.

The priority of the remainder of Desk Salespeople's tasks, which were neither interpreted as important or as urgent, was decided on the basis of personal preferences and criteria. The three main criteria used by Desk Salespeople were the revenue tied to each task, how easy the task was, and the status of the person that had asked for assistance. Edward, a Desk Salesman on one of the two Media and Technology teams, explained how these criteria came together:

It's a whole host of factors. If I was going to start a whole scrap from today, with nothing pressing, I would probably prioritize the ones worth the most to me. Other factors to take into account, it's kind of who it's for. I might have a big deal but I might have a DSL to do for the president of MEGACORP, which I put to the top. If I have a little thing and I haven't done it but it has been on my list a week then that will come to the top, and then I'll use my judgment.

Nancy, a Desk Saleswoman on one of the four retail teams described her own prioritization process as a set of nested criteria:

If nobody is shouting then it's what's going to give me the biggest revenue. If something that's going to bring in 40, 60, 80 pounds it gets slotted out quite a way down the pile. If someone wants a quote for something that is going to give me 30, 40, 50 thousand pounds worth of sale, that's going to get looked at first. So I prioritize on time, I mean obviously if it's 40, 50, 60

pounds and I can do it in two seconds it will be done and sent off without any problem, but if it's something that I need to be a bit more involved, such as a telephone headset etc... then it will go to the bottom of the pile. I don't just look at the pure value and say 'no, I'll do that... it'll take me three minutes but I'll do it in three days time'. If it can be done straight away, I'll do it. If I've got a customer who needs something urgently, that will get priority and then I look at it on a value basis. What's going to get me the most value.

The medium through which Desk Salespeople received problems and requests was of significance to the interpretation of their urgency and importance. Although the physical cues of email and phonecall are very similar, Desk Salespeople used their phone as a synchronous communication medium and email as an asynchronous one. Table 5.1. below compares the features of both mediums.

Table 5.1. – A comparison of features and uses of Desk Salespeople's phone and email technology¹⁴.

Features and uses	Phone	Electronic mail
Incoming communication alert	Beep Light	Beep Pop-up window
Message storing features	Message is stored as a voice recording	Message is stored as a text or HTML file
Asynchronous uses	Let the call go into voicemail and listen later	Let the email remain in the inbox and read later
Synchronous uses	Answer the phone upon receiving call	Reply to email on receiving message

John, a Desk Salesman on one of the four Retail teams explained how he interpreted phone-calls as “shouting” and emails as regular communication:

[People shout] only [on] phone calls. It's normally phone calls. If it is urgent then it's gone past the email stage and people... phone is quicker than email! Email also shows up immediately and it rings but it doesn't get acted on immediately [b]ecause very often if you have an email about something which is on your desk already, then you'll take a look at that email and go, 'oh yeah I can do that in half an hour or something,' and you'll continue to do what you're doing first. But if you get a phonecall, that jumps the queue, that gets your attention straight away. An email doesn't. It may get your attention but it doesn't guarantee that it will be acted straight away on. A phonecall is almost guaranteed to be acted straight away on. What you find is that either an email or a phonecall needs to be acted on unless it's for information only. If someone sends you an email or makes a phonecall and wants some information from you. If it's information they need quickly they will pick up the phone because by the time they write an email, then send it, goes through the system, I read it and act on it, send it back through the system to them, could be a couple of minutes, could be an hour or two, could be two or three hours. But on a phonecall,

¹⁴ Sources: Outlook Software Manual and Meridian Phone Manual.

people perceive that they get my attention straight away and if they think it is something that I can act on straight away, I will act on it then and there and I will possibly back it up by email. This is why they're phoning. If it's something they need quickly then they'll pick up the phone and they expect me to act on it while I'm on the phone and it's all right. It's a queue jumper. Irrespective of what else I'm doing, if that phone rings I answer it and that's why it's there. I don't let it go to voicemail. If I was coming down [for lunch] on my own, and the phone rings I'd have picked it up.

Although the alerts for a phonecall and email were the same, Desk Salespeople ignored email while engaging in a task, but expressed distress when their customers called in and they were already working on another customer issue. Larry, a Desk Salesperson in one of the Retail teams, expressed such distress when his phone rang while he was calculating prices for a private circuit. Larry raised his head abruptly from the notebook he was using to perform his calculations and made a rude gesture¹⁵ towards his phone, and then went back to pricing the private circuit he was working on. After being insistently called by Roger, an IT manager at one of his customers, during a morning that he had devoted to log sales on Siebel, Joseph, a Desk Salesman on one of the two Finance teams, finally picked up the call. Just before picking up the phone, Joseph sighed, "fuck you, Roger." He then picked up the headset and adopted a helpful tone, proceeding to explain to Roger how line resilience¹⁶ worked. Joseph let Roger hang up and then banged his headset down with a cathartic "fuck off!"

When Desk Salespeople were in the middle of a task that they did not want to interrupt, they used their phone in a way that gave their customers a 'line busy' signal. This was accomplished in two ways. One was by dialing into recorded phone conferences on product training and let their headset rest on their table. E-Tel kept a database of training seminars on the multiple products it offered to corporate customers that could be accessed over the phone. This meant that Desk Salespeople could keep their phone line busy while having a legitimate reason

¹⁵ This gesture is often described in slang as "giving the finger."

¹⁶ Line resilience is a technology offered by E-Tel to its corporate customers that prevents loss of communication during equipment faults in phone exchanges.

for doing so – they were doing training. The other tactic to keep their line busy was to enter into a conference call with each other. This tactic was used more frequently because it would prevent calls from being automatically passed to another Desk Salesperson on the team.¹⁷

In summary, instead of using Siebel – the formal information system put in place at E-Tel – each Desk Salesperson improvised their own information system to keep a record of their outstanding tasks and to keep a record of the information they needed to complete those tasks. These improvised information systems did not address the problem of deciding which task to engage in first. Desk Salespeople scaffolded that decision in a two-step process. First, they carried out those tasks sent by the customers and by field sales teams which were most visible. Second, they prioritized the remaining tasks according to their personal preferences.

DISCUSSION

This chapter answers a particular puzzle of Desk Salespeople's experience at DeskSales. Desk Salespeople engaged in enough service work to face considerable self-coordination challenges. However, Desk Salespeople had no formal process to address these coordination challenges. The process that Desk Salespeople improvised to address these challenges speaks to the problem of self-coordination of unprescribed work and to the problem of control of unprescribed work.

The problem of self-coordination of unprescribed work

Desk Salespeople's tactics in addressing their self-coordination challenges provide a model of self-coordination – one of the least studied coordination problems in studies of

¹⁷ The digital phone switch used at DeskSales had a cyclic hunting system that worked as follows: if the intended recipient of the call did not take it, the phone switch would transfer the call to the first open line on the team. If no one answered then the phone switch redirected the call to the intended recipient's voicemail.

organizations – for work that is constituted by a flow of tasks with varying duration and level of complexity, and with ambiguous priorities.

Since its inception (see e.g., Barnard, 1938; Follett, 1940; Taylor, 1947), the literature on coordination in organizations has focused on the problem of interpersonal coordination. According to the literature on coordination (see Crowston, 1997; Gupta, Dirsmith, & Fogarty, 1994), the main challenges that organizations and managers face is that of bringing together the efforts of individual workers into a common outcome, such as creating a product or delivering a service. The assumption is that the design of the production or service delivery process scaffolds the coordination of individual work across time. When self-coordination problems moved from the assembly line to the cubicle¹⁸, culture – especially occupational culture – replaced process design as the scaffold for coordinating individual work across time. This transition, however, shifted focus to the norms that workers draw on to decide what tasks to engage in but kept silent about the specific practices that scaffolded self-coordination, as the materiality of assembly lines and customer queues sublimated into the immateriality of “knowledge work” (see Ouchi, 1980 for a discussion of this shift, with a focus on coordination)¹⁹. Looking at the literature beyond that on coordination *strictu sensu* suggests that there is still ample room to develop a richer understanding of the coordination of individual work across time, even in the assembly line and at the service counter. Burawoy (1979) showed that assembly line workers had to improvise a set of self-coordination practices for their ‘goldbricking work’ because they could not rely on the prescribed self-coordination of the assembly line because they needed to keep their goldbricking

¹⁸ As many have documented (e.g. (Garson, 1988; Zuboff, 1988)) there are many jobs in which cubicles might as well be slots in an assembly line. Here, however, I am referring to work such as that done by engineers and designers where at each point in time workers have a choice of a number of different tasks to engage in ((see Barley & Kunda, 2004 for examples of such workers)).

¹⁹ Carlile ((2002)) does discuss the role of material artifacts in coordination but he does so only for interpersonal coordination, not for the coordination of individual work across time.

work hidden from their supervisors. Mars (1983) showed how jobs that were permeable to individual deviance (“donkey jobs”) required workers to improvise a way to track their deviant work practices across time and avoid detection.

Desk Salespeople self-coordination challenges and the processes that Desk Salespeople enacted to address them suggest that these challenges are not solely the province of deviant behavior. They are also present in employees’ unprescribed work tasks. My analysis of Desk Salespeople’s experience at DeskSales suggests that there are three basic self-coordination problems: keeping a record of outstanding work; storing and accessing the information needed to complete that outstanding work; and prioritizing among the tasks that constitute such work. Desk Salespeople’s tactics to deal with each of these problems suggests that each requires a different information system. To address the need to remember their outstanding tasks and the information needed to complete those tasks, Desk Salespeople improvised three sets of artifacts: to-do lists, “to-do piles”, and running logs. That agents draw on improvised artifacts to scaffold memory is a well documented finding in the management literature (e.g., see chapters in Heath et al., 2000; see also Weick, 1979; and Weick & Westley, 1996) and in the broader literature on cognition (Clark, 1997; Lave, 1988). What the practices that Desk Salespeople enacted with these artifacts, especially “to-do piles” and running logs, highlight is that distributed memory can be profitably scaffolded in convergent artifacts. Studies on the use of artifacts in organizations for distributed memory (e.g., Hutchins, 1991) have focused on how agents use different artifacts to scaffold their memory of different processes and different types of information. Desk Salespeople used the same artifact to scaffold their memory of the different processes and the different types of information related to each task. This allowed them to use these artifacts not only to scaffold their memory of each task but also to assess their progress towards its completion.

The process that Desk Salespeople improvised to assign priorities to each of their tasks contributes to the literature on coordination and organizations by showing how coordination process can cross organizational boundaries. To be sure, there is previous research that suggests that agents external to the organization have a say in its coordination processes. Institutional theory (Meyer et al., 1977) has suggested that organizations mimic coordination process of other organizations to earn legitimacy. The literature on occupations and organizations shows that the coordination systems used by occupational groups in organizations may draw from occupational norms instead of the organization's policies (see Van Maanen & Barley, 1984). Neither of these literatures however addresses the role of external agents in the coordination process. At DeskSales, Desk Salespeople drew on their customers' and their field salespeople practices to decide the priority of each of their outstanding tasks. Those tasks whose customers "shouted the loudest" were given priority over other tasks. All remaining tasks were assigned a priority based on personal criteria such as revenue or preference for a given type of task. Customers and field salespeople were thus used by Desk Salespeople to manage their prioritization process.

The outcome of these tactics was threefold. First, Desk Salespeople were able to successfully coordinate across time a set of tasks of varying duration and complexity. Desk Salespeople were able to do so in the absence of any formal system to scaffold the self-coordination of their service work. Secondly, as Desk Salespeople used their improvised self-coordination system, they reproduced it and diffused it to incoming members. To-do lists, to-do piles, running logs and annotated emails constituted a *de facto* parallel information system that ran alongside Siebel. Thirdly, the process that Desk Salespeople enacted to prioritize their service tasks eroded Desk Sales Managers' power over them. By responding to "shouting" customers Desk Salespeople reproduced a dual reporting structure: Desk Sales Managers held

Desk Salespeople accountable for representation work, customers held Desk Salespeople accountable for service work.

The problem of control of unprescribed work

Desk Salespeople's self-coordination processes shaped the practices that supervisors had to engage in to observe and to have the ability to control and coordinate their employees work. At DeskSales, Desk Salespeople used artifacts such as pen and paper, and Microsoft Excel spreadsheets to scaffold keeping track their work. To see Desk Salespeople's customer service work, Desk Sales Managers would have to either go to each Desk Salesperson's desk and computer and go through their to do list, "to do pile" and running logs, or have Desk Salespeople create a representation of these on Siebel or another information system that made Desk Salespeople's customer service work visible to Desk Sales Managers. If Desk Salespeople had used Siebel to improvise their to-do list, their to-do pile and running logs, then Desk Sales Managers would have only to issue a query on Siebel that would allow them to have real-time visibility of Desk Salespeople's service work. This shows that even in contexts of computer-mediated supervision, it is possible to keep work away from supervisors' gaze. This accomplishment, however, did not depend solely on Desk Salespeople's ingenuity but also on their Desk Sales Managers disregard for Desk Salespeople's service work. If Desk Sales Managers chose to monitor and enforce Desk Salespeople's service work, Desk Salespeople would have to put in more effort to keep their service work away from Desk Sales Managers.

CONCLUSION

The goal of this chapter was to look at the relationship between the formal and the informal elements of organizations in processes of self-coordination. Desk Salespeople's experience provides a rich look into this relationship because customer service tasks – their “real work” – created a number of self-coordination challenges that were not met by any formal coordination mechanisms. This mismatch opened up the process through which self-coordination practices emerged as Desk Salespeople dealt with their everyday self-coordination challenges. The analysis conducted in this chapter shows that emergent self-coordination practices led to a disconnect between the formal and the informal elements of organizations. Desk Salespeople did not use Siebel the formal artifact they had available to coordinate their own work across time. Instead, they improvised their own artifacts out of general purpose, ready-at-hand resources, such as pen and paper, Microsoft Excel spreadsheets and printed email messages. Siebel represented Desk Sales Managers' interests, not those of Desk Salespeople and it was interpreted as a resource that was alien to Desk Salespeople's customer service work. Siebel was not a resource to improvise with when addressing self-coordination problems. Instead, Desk Salespeople improvised a parallel information system that was invisible to the formal organization. This system represented Desk Salespeople's interests, allowing them to engage in the service work they needed to do for others in exchange for taking credit for others' sales.

Desk Salespeople's emergent self-coordination practices also inform our understanding of the emergent process of coordinating individual work across time. It suggests that the construction of self-coordination processes does not stop when incentives (Kerr, 1975), linking mechanisms (Mintzberg, 1995) and monitoring systems (Ball et al., 2000) are designed. Instead

self-coordination is an everyday, improvised and material achievement. Self-coordination requires adaptation to local condition for action, which can vary not only because of the punctuated influence of external agents but also because of the interaction of incremental and emergent organizational processes. This situated adaptation is a material process – its success depends on how individual agents use the resources they have available to improvise the practices necessary for concerted work. This study thus builds on Weick's (1990) and Orlikowski's (1996) observations of self-coordination practices by articulating a model of self-coordination based on the challenges that Desk Salespeople face in the course of their everyday work, the tactics Desk Salespeople enacted to address those challenges, and the intended and unintended outcomes of those tactics.

Self-coordination was but one of the challenges that Desk Salespeople faced when engaging in service work. Desk Salespeople could not address their customers' service issues themselves. They did not have the knowledge to do so and, even if they did, they were not allowed to leave their desks to visit their customers' premises. Desk Salespeople needed to enlist the cooperation of E-Tel's service units to successfully respond to their customers' service requests. Desk Salespeople, however, had no prescribed relationship with these service units and no formal grounds to enforce this cooperation. Desk Salespeople also lacked the formal ties needed to enlist the cooperation of E-Tel's service units. The next chapter explains how Desk Salespeople addressed this challenge.

CHAPTER 6:
UNPRESCRIBED COOPERATION THROUGH MEDIATED PERSONAL TIES AND
BEYOND

INTRODUCTION

Desk Salespeople needed to be able to address customers' and field salespeople's service issues. Desk Salespeople's service work allowed them to report sales field salespeople's sales and customers' orders as their own sales. Desk Salespeople, however, lacked the skill, the resources and the authority to do service work on their own. They needed the help of E-Tel's service units. Desk Salespeople, however, had no prescribed relationship with these units. Desk Salespeople had to build unprescribed cooperation ties with the service representatives working in these different service units. Only E-Tel's Central Service's representatives were permeable to this type of tie with Desk Salespeople. Service representatives in E-Tel's specialists service units and its Escalation unit were behind a wall of electric channels that made personal ties with these service representatives very difficult to establish and maintain. In this chapter, I show how Desk Salespeople were able to maintain mediated personal ties with Central Service representatives and engage the unprescribed cooperation of specialist service units and the Escalation unit without establishing enduring personal ties with service representatives in either. By explaining how Desk Salespeople were able to do so, my goal is to add to the research on unprescribed cooperation in organizations by showing that there are other tactics for unprescribed cooperation beyond enduring personal ties.

DESK SALESPEOPLE'S CONDITIONS FOR SERVICE WORK

Desk Salespeople's prescribed role placed them at a disadvantage to engage in service work. Desk Salespeople's prescribed sales role lacked the training to understand and solve customers' service issues, the access to E-Tel's service information systems, and the authority to engage the cooperation of E-Tel's service units to address those issues.

Desk Salespeople could not do their service work on their own. Desk Salespeople did not have the formal training nor did they have the work experience to address equipment faults. Only a handful of Desk Salespeople had any formal education beyond a high-school diploma. Not a single Desk Salesperson had any technical education whatsoever. Moreover, Desk Salespeople's work experience was limited to customer information call centers. Their job history did not include any technical experience that might qualify them for service work. Also their prescribed role was that of a salesperson. Therefore, they were not eligible for any of the many in-house training programs that E-Tel offered to its service people.

Even if Desk Salespeople had the necessary knowledge and skill to engage in service work, they would still be prevented from actually doing so. The problem was one of access. Customers' service problems and requests required two types of access, physical and electronic. Some service requests, such as repairing a telephone switch or installing telecommunications equipment required physical access to customers' premises. Desk Salespeople's role, as its label implies, was desk-based. Desk Salespeople had no permission and no budget to visit their customers. The remainder of customers' service problems and requests could be performed remotely, though E-Tel's many service-related information systems. However, Desk Salespeople did not have access to any of these information systems for two reasons. One was that Desk Salespeople's prescribed role did not require access to any service-related information system.

The other was that E-Tel, because of its past as a monopolist telephone service provider was heavily regulated. One of the norms that the company was subjected to was full separation between the information accessible to service units and the information accessible to commercial units such as DeskSales, to prevent anti-competitive practices.

Desk Salespeople lack of knowledge and access to do customer service work meant that they needed the cooperation of E-Tel's service units. However, Desk Salespeople's relationship with other parts of E-Tel was based on Desk Salespeople's prescribed sales role. Desk Salespeople had but three formal relationships within E-Tel. Desk Salespeople had a subordinate relationship with DeskSales' management, they were part of their field sales teams, and they could issue simple product orders to E-Tel's order fulfillment unit – the unit that was responsible for ensuring that customers' orders were recorded and delivered. Only one of these relationships, the relationship with E-Tel's Order Fulfillment, was with a service-related unit. However, E-Tel's Order Fulfillment did not address, nor did it have the power to address, customers' service requests and problems. E-Tel's Order Fulfillment only function was to record and deliver customer orders. Desk Salespeople had no prescribed relationships with any of the service units whose cooperation they needed to do their unprescribed service work. Cynthia, a Desk Saleswoman in one of the Retail sales teams, summarized Desk Salespeople's plight:

[When] we [...] hit the floor [i.e. when a Desk Salesperson first sits at their desk], [...] it's an upside down world. So when you come out of training and then you hit the desk the reality is that you're in a surreal world for a moment. What you have to learn to do is not dealing with your customers – dealing with customers over the telephone is an easy task to do. The difficult task was finding the relevant chains, the relevant lines, the uplines and downlines of communications within E-Tel to, for example, fill out [an order form] correctly. To deliver the expectation you already made to your customer and fill out the paperwork, find the contact to give you the information for that. Find a way to go to that. So the biggest dilemma was, within E-Tel we're selling relationships and [...] making relationships internally, but there [is] no guideline. There's no idiot's chart. There's no, 'this is your [general service] team, this is your [private circuit specialist service] team'. So the experience of the Desk Salesperson was very exciting to start with. You're in a corporate environment, you're high, fast moving, you're dealing with top-10 [...] customers, great selling point to your friends, to your family and to everybody else that wants to know what you're doing in E-Tel. The reality of it is that you're selling internally, you're not selling to your customers really. [...] You have to build relationships internally which is a sale

of me to personnel within E-Tel. If you don't make that relationship within E-Tel you're not going to sell anything, in the real world. You can sell [private circuits] to the customer, you can sell [DSL] to the customer, but without having that relationship internally, you can't go any further. And that was the reality as a Desk Salesperson.

As Cynthia suggests, Desk Salespeople needed to enact a set of tactics to enlist the unprescribed cooperation of E-Tel's service work. Without such unprescribed cooperation, Desk Salespeople could not help their customers with their service issues. This would jeopardize Desk Salespeople's ability to use Siebel to create a representation of compliance with sales and saleswork targets. Cynthia's explanation is suggestive in regards to the breadth of Desk Salespeople's unprescribed cooperation tactics. Cynthia used two very different expressions: "selling internally" and "building relationships." This suggests that unprescribed personal ties were one of the many tactics that Desk Salespeople enacted to enlist the cooperation of service units.

DESK SALESPEOPLE'S UNPRESCRIBED COOPERATION TACTICS

The unprescribed cooperation tactics that Desk Salespeople enacted were shaped by the complexity of their service work and by the specific features of each service unit. E-Tel had three types of service units: Central Service, specialist service units, and E-Tel's Escalation unit. Central Service addressed most of E-Tel's customers' service issues. It was the unit with which Desk Salespeople had the highest need and the highest opportunity to establish unprescribed personal ties. As they interacted with Central Service representatives, Desk Salespeople were able to establish such ties with them and use these ties to enlist Central Service representatives' unprescribed cooperation. Building enduring personal ties with specialist service representatives was more difficult because Desk Salespeople had a much lower frequency of interaction with this type of unit. Desk Salespeople were able to use these units' prescribed channels to place

orders. For simple service issues, Desk Salespeople allowed specialist service representatives to take credit for orders customers place to Desk Salespeople in exchange for specialist service representatives' unprescribed cooperation in Desk Salespeople's service work. For complex issues, Desk Salespeople exposed specialist service representatives to customers, who put pressure on specialist service representatives to get their service issues addressed promptly and effectively. E-Tel's Escalation unit could only be reached through an on-line form, precluding the use of any of the tactics that Desk Salespeople enacted to get the unprescribed cooperation of Central Service representatives and specialist service representatives. To enlist the cooperation of this unit, Desk Salespeople disguised their service tasks, increasing their importance to ensure that they would be one of the issues that this unit would choose to benefit from faster service.

Central Service: Mediated informal ties and tagged formal channels

Desk Salespeople had the highest need of and opportunity for establishing unprescribed personal ties with E-Tel's Central Service unit. Desk Salespeople needed the cooperation of Central Service for their unprescribed service work because this service unit was equipped, and had the formal responsibility to address most of the service problems and requests that Desk Salespeople received from their customers. This need for frequent interaction with Central Service created the opportunity to establish personal informal cooperation ties with Central Service representatives. This opportunity, however, was limited by Central Service's prescribed work processes and prescribed communication channels. Central Service managed its workload through a First-In-First-Out (FIFO) system. Unlike Desk Salespeople, Central Service representatives were not assigned to specific accounts. Instead customers' service requests arrived to a general electronic mail address for Central Service (CENTSERV@e-tel.com) –

called the “bucket” in E-Tel’s lingo – to which all central service representatives had access. According to Central Service’s prescribed procedure, Central Service representatives were required to address the problem or request that had been in the queue for longest. The description of the ordering process that Desk Salespeople received during their initial training upon joining described Central Service’s FIFO process in practice. In the second training session for the fourth batch of newly hired Desk Salespeople, Christine, their trainer, explained that when Desk Salespeople received an order from a customer they should fill all the necessary forms and “kick it to [Central] Service,” “if [Central] Service has any queries, they’ll come back to the customer or to you if the customer can’t answer.” Christine said that the order then went to Order Fulfillment (“people that spend the whole day entering orders into [the ordering system], that’s all they do”). If Order Fulfillment could not fill the order, it went to the bottom of their “bucket,” when it reached the top of the bucket again, the order then went to the bottom of the Central Service’s “bucket” and the first available service representative worked on it: “it can stay in this loop for 20 days,” Christine warned. The bucket nature of service had thus two consequences. Problems and requests were assigned to the first available service agent and the same problem and request could be assigned to different service agents as it moved from “bucket” to “bucket.” These two consequences created two challenges for Desk Salespeople when establishing an informal cooperation tie with Central Service representatives. First, Desk Salespeople could not be sure that the Central Service representatives with whom they had informal cooperation ties would be the ones working on the service problems and requests Desk Salespeople sent to Central Service. Secondly, Desk Salespeople could not be sure that the same Central Service representative would address each service problem and request as it bounced between Central Service and Order Fulfillment.

Central Service's prescribed communication channels made informal personal ties between Desk Salespeople and Central Service representatives even more difficult. Central Service representatives did not have personal electronic mail addresses that Desk Salespeople could use to reach individual Customer Service representatives directly. Central Service representatives did, however, have a direct telephone number but it could only be found in E-Tel's internal telephone directory by using the service representative's full name. It was not possible to find Central Service representatives' telephone numbers by specifying their function or the service center they belonged to. To summarize, Desk Salespeople needed the individual cooperation of Central Service representatives to accomplish their unprescribed service work. However, Central Service's work processes and formal communication channels hampered the creation of the personal informal ties that the literature suggests that such cooperation needs.

For routine customer service tasks, Desk Salespeople improvised on Central Service's formal work processes and communication channels to engage in the *mediated construction of informal ties*. At the beginning of their tenure at DeskSales, Desk Salespeople used Service's bucket system to report their customers' problems and requests. Once Desk Salespeople found a Service representative who was willing to help them with their routine service tasks, they used the telephone to establish a friendship tie with this service agent and used the telephone, not service's "bucket" electronic mail to engage the cooperation of Service representatives in Desk Salespeople's prescribed routine service tasks. One of Desk Salespeople's routine service tasks was to confirm that their customers' orders were delivered on time. Mark, a Desk Salesperson in one of the Technology and Media teams, called Marie, a Service representative in E-Tel's Corporate Customers Service Center, every morning to monitor the delivery of his customers'

orders. In one such call, Mark was not only able to get immediate information on the status of his customers' orders, but also to reinforce his good relationship with Marie.

Mark started the conversation by saying, with a smile, "I haven't spoken to you in a while." Marie replied with a giggle, "but we spoke yesterday." Mark immediately retorted, widening his smile "but you're so wonderful that time spent without speaking to you is counted in dog years!" Marie giggled and sighed, "Mark, you're such a charmer!" Mark then went into more serious matters, asking Marie about orders directly placed to Central Service. Marie confirmed that the orders had been placed and that installation was due to occur within the time frame requested by the customer. After he hung up Mark said, "I call them everyday and cheer them up, then they [check the status of any orders] I need, I don't work with any of [E-Tel's] systems."

When dealing with non-routine service tasks, Desk Salespeople faced a more difficult informal cooperation challenge, even when they had a relationship with Central Service representatives such as the one that Mark had with Marie. This cooperation challenge came from the mediated nature of that relationship. Routine tasks could be addressed in one or two phonecalls. Non-routine tasks required exchanging complex information across a longer time span – these tasks were too complex to coordinate over the telephone. In such tasks, Desk Salespeople improvised with Service's "bucket" electronic mail address to be able to communicate directly with the Service representatives with whom they had friendship ties. The goal was to ensure that it was these representatives, and no others, dealing with Desk Salespeople's non-routine problem or requests. Desk Salespeople worked around Service's prescribed communication channel in two ways. One was to write the name of the service representative with whom they had a friendship tie in the electronic mail message's subject line.

Service representatives responded to this tactic by moving to the next electronic mail in the Service queue and leaving these electronic mail messages in the “bucket” so that the named Service representatives would address them.

Desk Salespeople also used the phone to circumvent the difficulty of establishing a direct communication channel to a specific Central Service representative. Desk Salespeople called the Central Service representative with whom they had an enduring personal tie to alert her or him that they were sending an email to the bucket. Central Service representatives monitored Service’s electronic mail “bucket” and picked their Desk Salespeople’s message as soon as it entered the “bucket.” These two improvisations allowed Desk Salespeople to *place a tag on formal impersonal communication channels* to personalize service problems requests and the information needed to address them. The way Jeremy, a Desk Salesman in one of the four Retail teams, got a Central Service representative to help him address a problem with the EPROM of a telephone switch installed at one of his customers highlights the micro-practices that constituted this informal cooperation tactic. Jeremy had sent an electronic mail message to the Switch service center – a specialist service unit at E-Tel that delivered, repaired and answered queries about large telephone switches. Jeremy received a reply via electronic mail that stated the switch specialist service center would not deal with this problem because it was a “Service Center / Desk Salespeople activity.” Jeremy called Tom, the Service representative to whom Jeremy sent his routine service problems and requests. Jeremy wanted to let Tom know that Jeremy was sending him an electronic mail regarding this EPROM problem. Tom did not answer Jeremy’s call, so Jeremy wrote Tom an electronic mail giving him the details of the EPROM issue. Jeremy also included a thread with all the electronic mails he had exchanged with the customer regarding this issue. He sent the electronic mail to Service’s “bucket” electronic mail inbox but

put Tom's name in the subject line: "to the attention of Tom Campbell." Jeremy repeated this line at the start of the electronic mail message in underlined red characters. After sending the message, Jeremy called the customer to get more information on the switch configuration. Jeremy then called Tom and gave him a summary of the customer's own diagnosis of the problem. Tom asked Jeremy for additional details on the customer's switch setup and Jeremy replied that he was going to get a switch specialist "to do a bit of legwork." Jeremy said that he would then report back to Tom with the information. Jeremy finished the call thanking Tom for his help.

Jeremy's interaction with Tom shows a familiar pattern of unprescribed cooperation based on personal ties except for one important difference – the mediated nature of their interaction. It suggests that when unprescribed cooperation is mediated, there is an additional layer of work in the process of unprescribed cooperation: parties need to improvise ways to use prescribed communication channels for unprescribed ends.

Desk Salespeople's mediated relationships with a small number of Service representatives allowed them to engage Service representatives' cooperation in their unprescribed service work. There was, however, the possibility that these Service representatives were away from their workplace on training or on holidays. Away from the telephone and electronic mail that connected them to Desk Salespeople. In such occasions, Desk Salespeople drew on a practice frequently described in the sociological literature on informal networks: referrals (e.g., Fernandez, Castilla, & Moore, 2000). When Central Service representatives went on holiday or went on training, Desk Salespeople asked to be referred to other service agents that would honor informal cooperation ties. Larry's use of a referral to get information on all the telephone lines invoiced to one of his customers highlights the features of this tactic. AllesCorp,

one of Larry's customers, was switching all its analogical telephone lines to digital lines. This switch was being done in batches. Every three months Larry needed to look up all the telephone lines that were rented by one of AllesCorp's subsidiaries and create a service request to convert those lines to digital. Larry got Paul, his contact in Central Service, to do the analog line report for him. However, Paul was on holiday for the month of August, when one of AllesCorp's subsidiaries, TetraCorp, was due to have its lines converted to digital. Before Paul left for his holidays, Larry called him and got the name of another Central Service representative – Tom Andersen – who would be willing to help him. When Larry needed the report on TetraCorp's analog lines, he sent the following electronic mail to the Central Service "bucket."

> -----Original Message-----
> From: Howard,P,Larry,ETDS64 HOWARL R
> Sent: 13 August 2003 14:01
> To: E-TEL SERVICE G
> Cc:
> Subject: FOR TOM ANDERSEN - TETRACORP LINE REPORT
> A few months ago, I contacted Paul Morten and he did a report for me on lines for
> some of ALLESCORP subsidiaries. I believe he is on annual leave this week and gave >me your
> name as a contact.
> I was wondering whether you could help me in a similar way. I need to run a report on
> TETRACORP, which is now part of ALLESCORP. I need to find all the lines that are
> (including featurelines) invoiced to them. Is it possible if you could do this. If so
> how long would it take to run this report? If you have any queries or questions please
> get in contact with me. Many thanks!

Larry said that "this guy is Paul's buddy at the service center" and that "he doesn't really have to do this, but I hope he will." Larry got an electronic mail with a Microsoft Excel spreadsheet with the information on TetraCorp's lines the next day.

Taken together, the tactics that Desk Salespeople enacted to enlist the unprescribed cooperation of Central Service representatives focused on creating and maintaining an enduring mediated personal tie with a small number of these service representatives. The success of these tactics hinged on the frequency of communication between Desk Salespeople and Central

Service representatives. It was this frequency of communication that provided Desk Salespeople both the opportunity and the motive to establish enduring personal ties with Central Service representatives. Desk Salespeople has a much lower frequency of interaction with specialist service units. Although Desk Salespeople interacted with specialist service units on a daily basis, they seldom did so with the same specialist service unit. This jeopardized the opportunity and the motivation to establish enduring personal ties with specialist service representatives.

Specialist service units: Channeling, trading and exposing

Desk Salespeople only needed the help of each specific service unit occasionally. Consequently, Desk Salespeople had less of a need and less of an opportunity to build enduring personal ties with specialist service representatives. However, Desk Salespeople did need the unprescribed cooperation of these units for their service work. Desk Salespeople enacted three different tactics to enlist the unprescribed cooperation of specialist service representatives, depending on the complexity of the service task at hand. For orders, Desk Salespeople relied on specialist service representatives use of their prescribed ordering channels. Specialist service representatives placed any order they received through these channels even if they were from E-Tel units that were not allowed to place orders to specialist service units (such as DeskSales). For simple service tasks, Desk Salespeople allowed specialist service representatives to report some of the orders that customers placed to Desk Salespeople in exchange for specialist service representatives' cooperation in Desk Salespeople's service work. For complex service tasks, Desk Salespeople gave their customers the phone number of specialist service representatives to get customers to put pressure on them.

Desk Salespeople's relationship with specialist service units was different from their relationship with Central Service in two important ways. First, whereas Desk Salespeople had frequent contact with Central Service, they only had occasional contact with specialist service units. Whereas Central Service dealt with most service requests and problems for Desk Salespeople's customers, specialist service units dealt only with service problems and requests for specific products. DSL and Billing were two examples of specialist service units. The DSL specialist service unit only received DSL orders, only answered DSL questions and only repaired faults with DSL connections and equipment. The billing specialist service unit made changes to customers' billing options, answered billing questions and resolved payment and invoicing disputes. Desk Salespeople only called a specific specialist service unit when their customers placed requests or problems related to a specialist unit's knowledge. Desk Salespeople's relationship with Central Service thus entailed much more frequent interaction than their relationship with specialist service units.

Second, whereas Central Service shared with Desk Salespeople a high level of exposure to the customer, specialist service units were shielded from customer interaction. There were no formal communication channels for customers to contact specialist service units with problems and requests. Moreover specialists rarely called the customer directly when needing more information about a reported problem or service request. Instead specialist service representatives called Central Service or the account's Desk Salesperson and had them talk to the customer. Specialist service units were, however, similar to Central Service in that they used a "bucket" electronic mail address and dealt with problems and requests on a first-in-first-out basis.

Desk Salespeople had less of an opportunity to establish informal cooperation ties with specialist service representatives and, to some extent, less of a motive to do so. Desk Salespeople frequently needed the assistance of specialized service units, but they rarely needed the help of a specific specialized service unit at a frequency that would require informal cooperation ties. Nonetheless, Desk Salespeople needed a set of tactics to engage specialized service representatives in Desk Salespeople's unprescribed service work. The tactics that Desk Salespeople drew on to achieve the cooperation of these units depended on Desk Salespeople interpretation of how routine their customers problems and requests were for the specialist service unit whose cooperation Desk Salespeople needed.

The most routine of service tasks for which Desk Salespeople needed the help of specialist service units was placing orders. As Chapter 5 shows, one of Desk Salespeople's main sources of reported sales were the orders that customers placed directly with them. Desk Salespeople needed the cooperation of specialized service units to place orders for their customers because Desk Salespeople did not have access to any of the specialized order-placing information systems and no formal authority to initiate product installations at their customers' premises. Desk Salespeople used the formal communication channels to specialized service units to place these orders, in spite of not having any formal tie to these units. In practice this *channeling* tactic consisted of using the formal communication channels meant to receive product and service orders from Central Service. E-Tel's DSL specialist service unit used an electronic form to receive DSL orders from Central Service at its DSL-ORDERS@e-tel.com. DSL orders, however, not only provided revenue for Desk Salespeople to claim as the outcome of their own saleswork but also provided an opportunity to contact the upper echelons of their customers' management levels. Because of this, Desk Salespeople took on their customers' DSL

implementation and placed these orders themselves. For DSL specialist service representatives, the only difference between the orders received from Desk Salespeople and the orders received from customers was the internal E-Tel electronic mail address on the order's "From" field. DSL specialist service representatives, however, fulfilled Desk Salespeople's DSL orders without questioning their origin. This suggests that DSL specialist service representatives used their formal order channel canonically – they fulfilled every order they got in the shape of an order form sent to DSL-ORDERS@e-tel.com. However, specialist service representatives did not follow their formal ordering process– they took orders from Desk Salespeople instead of just taking orders from Central Service as they were supposed to.

Channeling – the tactic of using prescribed communication channels to support unprescribed work processes – allowed Desk Salespeople to engage the unprescribed cooperation of DSL specialist service representatives for their service work. Desk Salespeople used communication channels prescribed for Central Service in placing DSL orders, to make DSL orders directly on behalf of their customers. By doing so, Desk Salespeople created a *de facto* unprescribed but impersonal cooperation relationship with DSL specialist service representatives. This impersonal cooperation relationship, however, depended on DSL specialist service representatives' practices. If DSL specialist service representatives followed their prescribed relationships, they would have refused Desk Salespeople's DSL order forms thus compromising Desk Salespeople's ability to use DSL to establish a "central point of contact" relationship with their customers that allowed them to report customers' orders as the outcome of their own saleswork. It was specialist service representatives' disregard for their prescribed relationships with the rest of E-Tel that allowed Desk Salespeople to do so.

Desk Salespeople also needed the cooperation of specialist service units for routine service problems and requests. Enlisting the cooperation of specialist service units for routine service tasks was a more complex challenge than enlisting the cooperation of these service units to place orders. Whereas orders required no interaction between Desk Salespeople and specialist service representatives, this was not the case with service problems and requests, no matter how routine they were. Desk Salespeople needed to persuade specialist service representatives to accept work from a part of E-Tel with which they had no prescribed relationship with, through an informal use of the communication channel that connected specialist service representatives to the rest of E-Tel. When Desk Salespeople needed the cooperation of specialist service units to address a routine customer problem, Desk Salespeople engaged in a *spot trading arrangement* with a service representative in that specialist unit. In these spot trading arrangements, Desk Salespeople offered the right to represent work in exchange for specialist service representatives' assistance in addressing the service problems and requests that customers sent to Desk Salespeople. Specialist service representatives received a small bonus (10% of their salary, an average of \$3,000) for the value of the equipment their customers purchased as a result of service upgrades. If Desk Salespeople had unreported orders for the type of equipment that specialist service units billed for, Desk Salespeople allowed specialist service representatives to report these equipment orders as the outcome of their own service work in return for the help of specialist service representatives' help in addressing Desk Salespeople's service problems and requests.

Eric, a Desk Salesman in one of the two Technology and Media teams, received a call from a customer asking him to change the type of private circuits that connected all the stores of the customer's retail network. The customer wanted to change those circuits from a virtual

private network to an integrated private network. This required using E-Tel's private circuit information system to change several hundred circuits individually. Eric wrote the following electronic mail to the central electronic mail address of the private circuit specialist service unit:

> -----Original Message-----
> From: Rogers,T,ERIC,ETDS55 ROGERSER6 R
> Sent: 2 June 2003 16:22
> To: E-TEL PRIVCIRC G
> Cc:
> Subject: CHANGE FROM VPN TO IPN
>
> Hi,
> I received the following orders from TRICORP:
> 2 private circuits between Northville and Southville @ 150Kb per circuit
> 5 virtual private circuits between Athens and New York @ 500Kb per circuit
> I have not raised these orders so you can raise them yourself.
>
> TRICORP is wants to convert the VPN with their stores into an IPN (see attached
> spreadsheet for circuit references). Could you please execute this change and electronic mail
confirmations to me (jrogers@e-tel.com) and the customer (mrifkin@tricorp.com)

Eric explained, "I can only see the front end of [E-Tel's private circuit information system], so I sent this to [the private circuit specialist] service [unit] because it's not my job, I also sent them a 30K [thousand dollars] order to make them happy." Eric's expectation was that the specialist service representative that read this message was willing to make the circuit changes that Eric's customer requested in return for being allowed to place the order that Eric's customer had made.

Engaging the help of specialist service representatives for non-routine service problems and requests was more difficult than enlisting their help to address routine service tasks. Not only had Desk Salespeople to persuade specialist service representatives to accept work from a part of E-Tel they had no relationship with, but also to exert extra effort when doing so. In Desk Salespeople interpretation, this was especially challenging because specialist service had a relatively low exposure to customers, making them unresponsive even to customer problems that resulted from their own action. John, a Desk Salesman in one of the retail teams received a call

from a customer complaining about a virtual private network (VPN) that the VPN specialist service unit had installed for that customer. John said that customers always talk to Desk Salespeople for service issues, offering this analogy: "if there's a problem with the car you bought last week," he said as an example, "you're not going to call service, you're going to call the bloke who sold it to you." John explained that the exact same thing happens with Desk Salespeople, "I really shouldn't be dealing with this, as a Desk Salesperson, but who else is going to deal with it with the same urgency as I am?" John said that he could send it to the VPN specialist service center again but, he complained making a gesture of putting a sheet of paper under a big pile of paper on his desk exemplifying specialist service representatives putting his issue in the bottom of their "bucket," "they don't see the angry customer and they don't care if the customer doesn't buy from us anymore, in fact it's less work for them, but we're paid on what the customers buy." He called the VPN specialist service unit and the specialist service representative who answered his call told John that he was going to see what was going on at the customer's site. John said that "if they don't call me in an hour, I'll call them because the customer will call me asking what's going on."

To address specialist service units' isolation from the customer, Desk Salespeople improvised a tactic to give specialist service representatives the same *exposure* to customers that Desk Salespeople endured. Donald's successful attempt to have one of his customers put pressure on a DSL specialist service representative to address a line fault complaint highlights the central features of this tactic. Donald, a Desk Salesman in one of the Finance teams, received a call from a customer's senior manager reporting a DSL line fault. This fault was preventing this senior manager from participating in a virtual conference call. Donald needed the DSL specialist service unit to address this fault immediately. Donald lied to the DSL specialist

service representative who took his call saying that he was unable to diagnose the customer's problem, which meant that a DSL service representative had to call the customer directly. The DSL service representative said that he would call in an hour. Donald said that he was going to call the customer and tell them that they would get a call in an hour and asked for the DSL service representative's name (Gary). Donald also asked for a surname, and was told it was Harrison. Donald then called the customer and told him that he would get a call in an hour and gave him Gary's telephone number and full name and told the customer to call Gary if Gary didn't call him within an hour. Donald finished the call asking the customer to get in touch with him, if he didn't get a call from Gary and had trouble reaching Gary by himself.

As Donald's improvisation shows, exposing specialist service representatives to customers required two accomplishments. The first was to create a legitimate reason for a specialist service representative to call the customer. The second was to obtain the specialist service representative's contact information and pass it on to the customer. This made service representatives visible to customers and gave customers the possibility of making themselves visible to the specialist service representatives and get their problems and requests addressed.

E-Tel's escalation service unit: Disguising

E-Tel had a small set of units that, because of their function, had only very limited formal communication channels with the rest of the company. Desk Salespeople needed the cooperation of one such unit for their unprescribed service work – E-Tel's escalation unit. In E-Tel's lingo, escalating a customer's problem or request meant addressing it within a much shorter time span than usual. If a hospital had a problem with its telephone switch, E-Tel's escalation unit would address the problem immediately to prevent potential hazards for patients. A problem with a

regular company's telephone switch would be addressed by Central Service within a 3-day time span. E-Tel's escalation unit accepted escalation requests form Central Service via an on-line form and acted only on 5 of such requests per week.

Desk Salespeople needed the cooperation of E-Tel's escalation unit for their service work on two types of occasions: (i) when they forgot to ask for Central Service's help in addressing a customer's problem or request and would miss the deadline they had promised to their customer because of it; (ii) and when customers or field salespeople demanded urgent service in return for allowing Desk Salespeople to report an order as the outcome of their own saleswork. The challenge that Desk Salespeople faced when attempting to have escalation requests approved was threefold. First, Desk Salespeople had no formal relationships with E-Tel's escalation unit. E-Tel's escalation unit only had prescribed relationships with Central Service and with specialist service units. Formally, E-Tel's escalation unit could refuse Desk Salespeople's escalation requests on the grounds of not having a prescribed tie to DeskSales. Second, Desk Salespeople not only had to ensure that escalation engineers accepted their escalation requests, they also had to find a tactic to increase the likelihood that their escalation request was among the ones selected for escalation. Third, E-Tel's escalation unit could only be reached through E-Tel's escalation on-line form on the escalation unit's website. This precluded Desk Salespeople from forming personal informal ties with escalation engineers, ties that Desk Salespeople could use to have their escalation requests approved through reciprocity.

The way Todd, a Desk Salesman in one of the retail sales teams attempted to have an escalation request approved highlights the core features of the *disguising* tactic that Desk Salespeople drew on to enlist the cooperation of E-Tel's escalation unit. Todd received a call from a customer asking him to confirm a telephone switch installation, ordered three weeks ago

and due within the next two days. Todd realized that he had not placed the order with Central Service, which meant that he would miss the date that he had promised to his customer by at least three days. To avoid this, Todd wrote an escalation case to get his customer's telephone switch installed within 2 days. Todd lied on the escalation form to increase the likelihood of having his escalation case accepted. After completing the on-line escalation form, Todd said that this escalation case was "a work of Tolstoy, just pure fiction." He pointed to the value he entered on the form and said, "I put in \$100 000, but it's really at best \$42 000. He then showed the dates he had put for the promised lead time and told me: "I put June 7 because I know that's their criteria, it can't be less than half the standard lead time." He explained: "I know the criteria because on an electronic mail I got about a rejected escalation case they inadvertently noted that it was under half the promised lead time." Todd added "I know they don't have access to systems. I once put in an escalation case for an ISDN that I said was worth 85K, as much as a private circuit! They don't even have access to pricing!" Todd said that "everyone knows that all escalation cases are made up." He told me that he also did it the last time he had to put one through. Todd said that the last one he put through was for a customer's store that was opening and had to wait 10 days for a telephone line. He told me that he wrote that it was "a life or death situation," saying that the store could be robbed and there would be no way to call the police, or if the store had a fire and be unable to call the firemen.

Todd's attempt to anticipate the installation of a private circuit for his customer shows how Desk Salespeople were able to engage E-Tel's escalation unit in their unprescribed service work, in spite of not having any possibility of establishing any personal informal ties with escalation service representatives. First, E-Tel's escalation unit used its prescribed communication channel canonically while not following its prescribed relationships with the rest

of E-Tel. E-Tel's escalation unit only evaluated escalation requests that it got through its on-line escalation form. However, E-Tel's escalation unit considered every request that it received through its web-form, even if that request originated from units other than service and specialist service units such as DeskSales.

Second, Desk Salespeople had to disguise their urgent service requests and problems to fit E-Tel's escalation unit's criteria for selection. A small number of Desk Salespeople, such as Todd, knew some of the selection criteria and wrote their escalation cases to match those criteria. The Desk Salespeople who did not know those criteria inflated the importance of their service problems and requests with the hope that the threat of losing a large amount of revenue was enough for their escalation cases to be selected.

The third and final point was that Desk Salespeople took advantage of the isolation that protected E-Tel's escalation unit from the pressure of customer-facing units to create escalation cases that were more likely to be selected. Todd's awareness that E-Tel's escalation unit had no access to pricing information systems allowed him to inflate prices to increase the likelihood that his escalation case was selected for action.

Taken together the tactics that Desk Salespeople enacted to enlist the cooperation of E-Tel's multiple service units highlight the importance of managing the visibility of work in unprescribed cooperation and suggest that unprescribed cooperation can unfold across spot personal ties and also through impersonal mechanisms.

DISCUSSION

The literature on unprescribed cooperation in organizations has focused on explaining how agents draw on enduring personal ties to enlist the unprescribed cooperation of others (Bower & Abolafia, 1995; Ezzamel et al., 2001). My analysis of Desk Salespeople's experience at DeskSales adds to this literature in three ways. First, my analysis underscores the problem of visibility in unprescribed cooperation. The mediated nature of Desk Salespeople's personal ties with service representatives was a challenge when Desk Salespeople needed to make their work visible to Central Service representatives. Second, my analysis shows that unprescribed cooperation can be achieved through 'spot', ephemeral ties. Desk Salespeople were able to establish a single-task cooperation tie with specialist service representatives through trading arrangements or by exposing specialist service representatives to customers. Finally, my analysis shows that unprescribed cooperation can be an impersonal process. Desk Salespeople used E-Tel's escalation unit's on-line form to enlist the unprescribed cooperation of this unit without having a single interaction with its members.

Making work visible

Desk Salespeople's use of their personal ties with Central Service representatives for non-routine work surfaced the problem of making work visible. The literature on unprescribed cooperation in organizations has not paid much attention to this problem. This literature has mostly studied settings where mediated communication does not represent an obstacle to unprescribed cooperation (e.g., Burawoy, 1979; Dalton, 1957; Gouldner, 1954; Walther & Burgoon, 1992). The literature on computer-mediated cooperation has also mostly focused on

settings where work arrangements are designed to facilitate communication to overcome spatial and temporal distance (Cunha & Cunha, 2001; Jarvenpaa et al., 1999; Schultze et al., 2001). As E-Tel's "bucket" communication system highlights, managers may adopt criteria other than fostering intra-organizational interaction when designing communication systems. E-Tel's "bucket" system was created to make service work more efficient. The FIFO workflow that this communication channel supported minimized the ability of other E-Tel units to interrupt Central Service representatives' work. This gave Central Service representatives more control over the pace of their work. This communication system was an obstacle to Desk Salespeople's unprescribed cooperation with Central Service representatives. Desk Salespeople had no way to send information about non-routine customer service issues to Central Service representatives. Desk Salespeople were nonetheless able to improvise on Central Service representatives' "bucket" system to establish a direct communication channel with Central Service representatives. By enacting this improvisation, Desk Salespeople were able to use a 'one-to-many' communication technology to create a 'one-to-one' communication channel. This improvisation allowed Desk Salespeople to make their service work visible to those Desk Salespeople with whom they had a personal tie. Without this communication channel, Central Service representatives could only have helped Desk Salespeople in their routine service tasks.

Desk Salespeople's challenge to make their unprescribed work visible and the improvisations they enacted to address this challenge adds to the current accounts of unprescribed cooperation by articulating one of the crucial tasks to carry out this type of cooperation – making their work visible. Unprescribed cooperation requires a process through which the party seeking assistance to carry out a specific task is able to provide information about that task to the party providing assistance. When unprescribed cooperation is carried out in

contexts where unprescribed communication is not hindered by prescribed communication channels, it is easy to provide that information. However, if managers implement communication technology to hinder unprescribed communication, then unprescribed cooperation will require more work than simply establishing and maintaining personal ties. Agents will need to make their work visible through communication channels that are hostile to unprescribed cooperation based on personal ties.

'Spot' unprescribed cooperation

The literature on unprescribed cooperation in organizations has documented how agents use enduring personal ties to enact unprescribed spot arrangements (Burawoy, 1979; Dalton, 1950; Manning, 1977). Research on unprescribed cooperation practices associated with formal performance measurement (Ball et al., 2000) and the broader literature on performance measurement in organizations (Van Maanen et al., 1994) have shown that employees can engage in trading to achieve performance targets without engaging in the level of effort necessary to reach those targets. However, these studies show that these trading arrangements occur in the context of enduring personal ties. That was not the case at DeskSales. Desk Salespeople were able to trade the right to report customers' orders in exchange for specialist service representatives' unprescribed cooperation in their service work. The difference is that trading in the context of personal ties hinges on delayed reciprocity (cf. Gouldner, 1960): employees in these studies have similar interests and trade like for like. In such cases, reciprocity has a temporal element. The spot trade is not carried out simultaneously. Thus, a policewoman allows a policeman to log her arrests as his own, knowing that if she falls short of her target next month she can go to him for help.

Desk Salespeople's trading with specialist service representatives was instantaneous. Desk Salespeople offered specialist service representatives orders to report as their own in the same email message where they asked for specialist service representatives' help. There was no need for personal ties to ensure reciprocity. Moreover, Desk Salespeople's spot training with specialist service representatives did not lead to personal ties. Desk Salespeople did not require the help of each specific specialist service unit frequently for specialist service representatives to be able to rely on Desk Salespeople to meet their targets for reported orders. The low frequency of interaction with specific service unit also limited Desk Salespeople's motivation to establish personal ties with specialist service representatives. Together, the limited motivation that specialist service representatives and Desk Salespeople had to establish enduring personal ties with each other and the instantaneous nature of their trading arrangements reproduced the 'spot' nature of this tactics.

Desk Salespeople's tactics to enlist the cooperation of specialist service representatives also adds to the literature on unprescribed cooperation in organizations by showing how external agents can participate in unprescribed cooperation among organizational units Desk Salespeople were able to establish 'spot' relationships between their customers and specialist service representatives to enlist the help of the latter in their non-routine service tasks. By enacting this tactic, Desk Salespeople were deflecting to specialist service representatives the pressure that customers placed on them. Once Desk Salespeople exposed specialist service representatives to customers, they considered their role regarding that specific service issue completed. Desk Salespeople's expectation was that specialist service representatives responded to customer-induced pressure like Desk Salespeople did. The low frequency with which each customer experienced the same type of complex service issue limited the establishment of personal ties

between customers and specialist service representatives. Moreover, specialist service representatives shun away from customer contact to avoid this pressure, further hindering the possibility of personal ties between specialist service representatives and customers.

Together, Desk Salespeople's enactment of trading and exposing tactics shows that spot unprescribed cooperation arrangements are not only possible but also viable. Enduring personal ties are not a necessary condition for unprescribed cooperation. Instead, they are one of the possible conditions in which such cooperation may occur.

Impersonal unprescribed cooperation

The literature on unprescribed cooperation in organizations tends to equate unprescribed cooperation with cooperation based on enduring personal ties (e.g., Krackhardt, Brass, & Galaskiewics, 1994). Research on unprescribed cooperation in organizations has focused on how agents use personal communication channels, such as meetings (Watson, 2001), telephone (Bain et al., 2000) and email (Romm et al., 1998), to engage in unprescribed cooperation.

Desk Salespeople's channeling tactic and especially their disguising tactic show that unprescribed cooperation can also be achieved by impersonal means. Desk Salespeople were able to enlist the cooperation of E-Tel's escalation unit without ever directly communicating to anyone in the unit. Instead, they used formal impersonal channels to obtain the help of E-Tel's Escalation unit in their service work, even for service tasks that this unit would otherwise reject. This suggests that when documenting and explaining unprescribed cooperation in organizations researchers have not only to observe the network of communication, which includes impersonal channels such as the escalation forms used by E-Tel's Escalation unit.

CONCLUSION

The goal of this chapter was to explain how Desk Salespeople were able to accomplish their service work without being able to do that work on their own and without having the authority to make others do it for them. Desk Salespeople were able to carry out their service work by enlisting the unprescribed cooperation of E-Tel's service units through personal and impersonal tactics. Desk Salespeople's unprescribed cooperation tactics show that unprescribed cooperation can happen through personal ties that last only as long as a service task and that vanish once that task is completed. What is more, Desk Salespeople's 'channeling' and 'disguising' tactics show that unprescribed cooperation can happen in the absence of any kind of personal interaction.

This chapter makes the case for complementing the study of unprescribed cooperation practices based on enduring personal relationships with the study of unprescribed cooperation tactics based on thinner relationships and in the improvisational use of formal communication channels. Desk Salespeople's unprescribed cooperation tactics reveal a 'shadow' organization much broader than the "organization behind the charts" that enduring personal ties constitute. These tactics show how formal organizational resources, such as communication channels, performance appraisal systems and incentive systems can be used to ends that may even conflict with their intended purposes. The communication channels designed to protect E-Tel's escalation unit from pressures from the rest of the organization were used by Desk Salespeople to increase that pressure on behalf of Desk Salespeople's customers. Desk Salespeople used the incentive systems that were designed to motivate specialist service representatives to upgrade their customers' equipment to get specialist service representatives to help Desk Salespeople with their routine service tasks.

More importantly, my analysis of Desk Salespeople's unprescribed cooperation tactics shows that the network of unprescribed personal ties in an organization accounts only for part of the unprescribed cooperation in that organization. That network of personal ties is but a part of the network of unprescribed practices that supports unprescribed cooperation in organizations.

CHAPTER 7: FAÇADES, WORK VISIBILITY AND THE PRODUCTION OF FORMAL REPRESENTATIONS OF WORK

My goal in this chapter is to integrate my analysis of Desk Salespeople's experience into two theoretical contributions. The first theoretical contribution is to provide a view of agency in the production of computer-generated formal representations of work. This view complements the dominant view of agency in this process. This dominant view shows how information technology generates formal representations of employees' action as they use this technology to engage in their everyday work (Ball et al., 2000). The role of employees in this process is one of more or less unwilling subjects of observation. The role of managers is that of willing agents of observation through these computer-generated formal representations of work. My analysis of Desk Salespeople's experience shows that managers and employees can take the leading role in the production of computer-generated formal representations of work. At DeskSales, they did so by participating in the creation of a façade of compliance with prescribed goals, rules, roles and procedures. By creating this façade of compliance for upper-level managers, they were able to reap the organizational and personal benefits of complying with prescribed targets for sales and saleswork without doing the work needed to reach those targets.

The second theoretical contribution is to provide an alternative tactic for agents to shape the visibility of their action to others. The dominant view of practice visibility argues that managing the visibility of one's practices is accomplished by regionalizing spaces of interaction into front stages and back stages (Giddens, 1986; Hagerstrand, 1967; Turner, 1974). My analysis of Desk Salespeople's experience shows that agents can also regionalize spaces into façades. When doing so, agents attempt to shape their audience's interpretation of the space of interaction

as a back stage, providing full visibility of agents' practices. However, agents use that space as a front stage to put out a performance for their own benefit.

Before explaining these two contributions in detail, I summarize my analysis of Desk Salespeople's and Desk Sales Managers' experience at DeskSales.

A SUMMARY OF REPRESENTATION WORK AT DESKSALES

The preceding three chapters have highlighted the following: Desk Sales Managers were under pressure to create a formal representation of compliance with the sales and saleswork targets that DeskSales' two General Managers imposed on the unit. Desk Sales Managers had to create this representation of compliance by leading a team of inexperienced and poorly trained Desk Salespeople with little will or skill to sell. Desk Sales Managers were able to have their Desk Salespeople create a representation of compliance with their prescribed sales and saleswork targets. Desk Sales Managers succeeded in this goal by enforcing the creation of such representations instead of enforcing the sales and saleswork that would produce a representation of compliance with prescribed goals, rules, roles and procedures. Desk Salespeople could produce a representation of compliance with saleswork targets by improvising with their prescribed information system – Siebel – because upper-level managers only had access to very aggregate reports of Desk Salespeople's sales and saleswork. These improvisations in Siebel were not enough to see Desk Salespeople through as far as their sales targets were concerned. Field Salespeople stood between Desk Salespeople and their ability to represent customers' orders and some of field salespeople's sales as the outcome of their own saleswork. Field salespeople guarded their accounts jealously from other E-Tel units including DeskSales. By taking on field salespeople's service work, Desk Salespeople were able to persuade field

salespeople to allow Desk Salespeople to report some of field salespeople's sales and all customers' orders as the outcome of their own saleswork.

Engaging in customer service was far from a trivial task. Customer service work posed self-coordination and cooperation challenges for Desk Salespeople. Desk Salespeople interpreted Siebel – their prescribed information system – as a “reporting tool.” Siebel was there to produce a formal representation of compliance with sales and saleswork targets. Desk Salespeople's service work was nonetheless complex enough to require an information system for three purposes. First, Desk Salespeople needed an information system to scaffold the memory of their outstanding service tasks. Second, Desk Salespeople needed an information system to scaffold the memory of the information they needed to complete their outstanding service work. Thirdly and finally, Desk Salespeople needed an information system to prioritize their service tasks and keep a record of those priorities. Desk Salespeople improvised a paper-based information system to scaffold their service work. Also, Desk Salespeople prioritized their service work according to how visible each service task was made by their customers.

Desk Salespeople did not have the knowledge, nor did they have the resources to engage in service work on their own. Desk Salespeople needed to enlist the unprescribed cooperation of E-Tel's multiple service units to this end. Desk Salespeople were able to establish mediated personal ties with Central Service – E-Tel's main service unit. Desk Salespeople drew on these personal ties to invoke the cooperation of central service representatives in Desk Salespeople's service tasks. Desk Salespeople were able to get the cooperation of specialist service units in three different ways. One was by taking advantage of specialist service representatives' use of order forms. Desk Salespeople sent orders to specialist service units although they were not allowed to do so. Specialist service representatives filled any order as long as it was in a form,

allowing Desk Salespeople to use these units to fill their customers' orders. Desk Salespeople were also able to trade with specialist service representatives representation rights for cooperation in service work. Desk Salespeople allowed specialist service representatives to report some of the orders that customers placed to Desk Salespeople as their own. In return specialist service representatives helped Desk Salespeople with their service tasks. Third, Desk Salespeople were able to expose specialist service representatives to customers. This allowed Desk Salespeople to transfer the pressure they got from customers to specialist service representatives and thus enlist their cooperation in service tasks.

This summary of my analysis of Desk Sales Managers and Desk Salespeople's challenges at DeskSales and the tactics that they enacted to address those challenges suggests that Desk Sales Managers and Desk Salespeople played a central role in the production of formal representations of their work in Siebel. This not only suggests a complementary view of the role of managers and employees in the production of computer-generated formal representations of work, but also an alternative approach to managing the visibility of action in organizations.

To make the first point, I articulate six differences between the view of agency in the production of computer-generated formal representations of work suggested by my research at DeskSales and the dominant view of agency in this process espoused by the literature on information technology and organizations.

To make the second point, I explain how agents can shape the visibility of their action by regionalizing their information system into a façade which combines elements of front stages with elements of back stages.

ON AGENCY IN COMPUTER-GENERATED FORMAL REPRESENTATIONS OF WORK

My analysis of Desk Salespeople's and Desk Sales Managers' practices with and around Siebel suggests a view of the role of agency in producing computer-generated formal representations of work that complements the dominant approach to this topic. Specifically, my research at DeskSales suggests a role for agents in the production of computer-generated formal representations of work that differs from the dominant view on their role in this process in six aspects.

First, I show that at DeskSales, the production of computer-generated formal representations of work was a labor intensive process. Desk Salespeople not only had to enter a representation of compliance with sales and saleswork targets, but also do service work to obtain permission to report others' sales as their own. This is more work than what the dominant view on the production of computer-generated formal representations of work suggests. According to this view, formal representations of work are produced by employees as they engage in their everyday work because the information technology that employees use in their work is the same that managers use to supervise that work.

Second, I explain that at DeskSales, Desk Sales and the DeskSales General Manager used computer-generated formal representations of work to showcase their employees' performance to upper-level managers. This complements the dominant view on managers' use of formal representations of work to supervise downwards. Desk Sales Managers only supervised representation work using their own improvised representations of Desk Salespeople's production of a representation of compliance with prescribed targets in Siebel. Formal

representations of work, such as Siebel reports were instead used to showcase their Desk Salespeople's reported performance to their own managers.

Third, I show that Desk Sales Managers and the DeskSales General Manager, enforced Desk Salespeople to do representation work. A majority of Desk Salespeople cared little for how much bonus they received and how fast they could climb up E-Tel's corporate ladder. Desk Sales Managers enacted a set of practices to make these Desk Salespeople engage in representation work in spite of their lack of motivation to do so. The dominant view in the literature on the production of computer-generated formal representations of work focuses on employees' motivation for and enactment of deviant practices. My research at DeskSales shows that managers have at least as much will and skill in enacting deviant practices in the production of computer-generated formal representations of work.

Fourth, I show that at DeskSales managers from Desk Sales Managers up supervised the work of those below them through summarized formal representations of work. Managers used formal representations of compliance with prescribed goals and procedures to showcase their competence and success to their won managers. Scrutinizing their employees work could only jeopardize that compliance. This complements the dominant literature on the production of computer-generated formal representations of work by highlighting that managers may be more effective in accomplishing their own goals if they forfeit the detailed scrutiny that this literature underscores as one of managers' major uses of computer-generated formal representations of work.

Fifth, I show that Desk Salespeople were not only able to create a formal representation of compliance with sales targets without doing any sales but also that they were able to engage in service tasks without creating a formal representation of this work. This suggests that the tight

coupling between work and its representation that grounds the dominant view on the role of agency in the production of computer-generated formal representations of work can be complemented with a view that makes the coupling between work and its representation a deliberate choice of employees and first line managers.

Sixth, I show that computer-generated formal representations of work are not only at stake in hierarchical relationships, as the dominant view on the role of agents in these representations suggests. Instead, computer-generated formal representations of work are also at stake in horizontal relationships when agents seek to enlist the cooperation of others with whom they have no personal ties.

After explaining each of these six points below, I integrate them into a view of the role of agency in the production of computer-generated formal representations of work that complements the dominant view of agency in this process.

1. Working for representation work, not just representing work

My analysis of Desk Salespeople's experience highlights how labor-intensive the role of agents in computer-mediated representation work is – the production of formal representations of work. The effort that Desk Salespeople made to produce a representation of their saleswork targets is familiar to students of representation work in the context of human-generated formal representations of work. When Carmen was their General Manager, Desk Salespeople had only to call friends, colleagues and relatives to meet their customer call targets. When Mariah took over as General Manager, Desk Salespeople had only to log seven to ten calls to customers a day in Siebel to meet their saleswork targets. Desk Salespeople had to spend some time during their workday or their work week entering this information in Siebel. Desk Salespeople routinely complained about having to engage in this representation work. However, this work and Desk

Salespeople's complaints about it echo similar practices and interpretations of employees and lower-level managers in earlier studies of representation work. Van Maanen and Pentland's (1994) research on the production of human-generated formal representations of work by police people and auditors documents similar practices in shaping formal representations of work.

The effort that Desk Salespeople had to put in to produce a representation of compliance with their sales targets was much higher and thus more difficult than that observed in the current literature on formal representations of work. Desk Salespeople had to engage in service work to earn field salespeople's permission to report some of field salespeople's sales as the outcome of their own saleswork. Desk Salespeople spent most of their time at work engaging in service tasks that ranged from the very menial (e.g., correcting errors in field salespeople's Siebel records) to the very complex (e.g., coordinating the information and communication technology service work for a company moving headquarters). As Desk Salespeople's motivation patterns highlight, the core reason for Desk Salespeople's service work was to earn field salespeople's approval for their representation work regarding their sales targets. This suggests that when a group has fine-grained visibility over the representation work of an agent, such as field salespeople had of Desk Salespeople's use of Siebel, then an arrangement emerges between the agent and the group regarding the agent's representation work. That agreement may be a tacit one based on personal ties (cf. Tirole, 1986). However, at DeskSales that agreement entailed a significant amount of work. The current literature suggests that producing a formal representation of work requires at most the introduction of data in formal the organization's formal information system (e.g., Zuboff, 1988). At DeskSales, that was just the tip of Desk Salespeople's work. Desk Salespeople's everyday service work was only carried out so that Desk Salespeople had

something to provide to field salespeople in return for being allowed to report customers' orders and field salespeople's sales as their own sales.

2. Showing upward, not only seeing downward

The second contribution that my analysis of Desk Salespeople's experience makes is to provide an alternative view of agency in the production of computer-generated formal representations of work is to explain an alternative to the literature's current understanding of managers' use of these formal representations of their employees' work.

Desk Sales Managers used Siebel differently than the dominant view of the production and use of computer-generated formal representations of work would predict (cf. Ball, 2003; Findlay et al., 2003; Sewell et al., 1992; Townsend, 2005). Desk Sales Managers did not use Siebel to supervise Desk Salespeople. Instead, Desk Sales Managers used Siebel to create a formal representation of Desk Salespeople's compliance with prescribed roles, rules and procedures and, most importantly, with prescribed goals. Desk Sales Managers did not even enforce the use of Siebel in Desk Salespeople's everyday work – be it service or sales. Instead, Desk Sales Managers used audiocalls to have their Desk Salespeople create a representation of compliance with prescribed sales and saleswork targets. Desk Sales Managers did not use Siebel to enforce the creation of this representation. Instead they used their team's whiteboard to record Desk Salespeople's efforts to create a representation of compliance in Siebel. These very whiteboards, however, were used to show compliance upward when the opportunity arose. Desk Sales Managers changed their team's whiteboard to present sales and saleswork achievements, which were not even recorded in Siebel, when upper-level managers visited DeskSales. Desk Sales Managers were not alone in their use of Siebel to show compliance upwards, rather than using it to supervise compliance downwards. The DeskSales' General Manager did not verify

how closely Desk Salespeople's work reflected the formal representation of their work in Siebel. Quite the opposite. Mariah designed and advocated a specific formal representation of Desk Salespeople's work – the Market Manager's Report. This report was a Microsoft PowerPoint presentation compiling a set of indicators from Siebel. Mariah prepared one such report for each Desk Sales Team every month and sent it to their respective field sales directorate's General Manager. These reports only contained limited information. Field directorates' general managers would thus be hard pressed to link Desk Salespeople's achievements to specific sales and saleswork records. Taken together this shows that formal representations of work need not be used to supervise compliance downwards. They can also be used to project a façade of compliance upwards, even if there is no action to support it.

3. Managerial deviance, not only employee deviance

The third contribution that my analysis of Desk Salespeople's experience makes to an alternative view of agency in the production of computer-generated formal representations of work is to show that lower-level managers can have as much if not more at stake than employees in formal representations of employees' work.

It was Desk Sales Managers who enforced Desk Salespeople's representation work, not Desk Salespeople who attempted to obtain Desk Sales Managers' collusion for compliance (cf. Kemper, 1966; Webb et al., 1998). Desk Sales Managers enforced Desk Salespeople's representation work to create a façade of compliance that they could show upwards. Only a small number of employees exhibited a motivational pattern that led to compliance with sales and saleswork targets. All the other Desk Salespeople either cared only for representing compliance with sales targets or, as with the case of wage-earners, cared for neither. Desk Sales Managers, however, had much at stake in their Desk Salespeople's success in creating a formal

representation of compliance: their bonus, their political strength at E-Tel, and their career prospects. Desk Sales Managers could not just create a representation of compliance nor could they rely on Desk Salespeople to do so. Siebel checked E-Tel's payment tracking system to make sure that any reported sales in Siebel was matched to a customer's payment. Therefore, the only way to report a sale in Siebel without selling was to get the permission to report others sales as one's own. Desk Sales Managers thus needed Desk Salespeople to persuade field salespeople to allow them to report field salespeople's sales as their own. Desk Sales Managers had to improvise and enact a full set of supervision practices to have Desk Salespeople create a representation of compliance.

To be sure that all the Desk Salespeople in their team met both sales and saleswork targets, Desk Sales Managers had to improvise their own supervision resources and their own incentive systems on top of those prescribed by E-Tel. Desk Sales Managers used their team's audiocalls as their major forum for supervision. Desk Salespeople, especially those more committed to representation work kept sales off Siebel until it was to their advantage to report those sales. Desk Sales Managers needed to learn about these unreported sales to have Desk Salespeople report them when the team as a whole was lagging behind its sales targets. Desk Sales Managers had no possibility of learning about these sales without directly asking Desk Salespeople during their team's audiocall. Desk Sales Managers improvised with their team's whiteboard to substitute for Siebel's role in enforcing compliance. Desk Sales Managers used whiteboards to shame Desk Salespeople lagging behind in using Siebel to represent compliance with sales and saleswork. Desk Sales Managers also improvised their own ad-hoc incentives to foster representation work for specific types of sales and saleswork where their team was lagging behind its targets. Taken together, this shows that Desk Sales Managers and a number of Desk

Salespeople had the motivation to engage in representation work and both participated in the production of a façade of compliance with sales and saleswork targets in Siebel.

The motivation to improvise these supervision practices did not result solely from Desk Sales Managers' monetary aspirations and their career aspirations. It also resulted from DeskSales General Manager's pressure to represent compliance with sales and saleswork targets. General Managers had Desk Sales Teams report sales and saleswork, even when Desk Salespeople were on holiday or sick at home. General Managers also routinely supervised Desk Sales Teams reported sales and saleswork figures in Siebel and enforced representing compliance when those figures lagged behind the unit's targets.

At DeskSales formal representations of work were used to show compliance upward, not to monitor it downward. Consequently, upper-level managers were at least as motivated as lower-level managers and employees below them to enforce a representation of compliance.

4. Supervision based on summarized formal representations of work, not supervision based on detailed formal representations of work

The fourth contribution that my analysis of Desk Salespeople's experience makes to an alternative view of agency in the production of computer-generated formal representations of work is to explain how upper-level managers' use of these representations shaped their production. Upper-level managers only had access to Siebel-generated statistics at a very aggregate level. They only received reports on the total value of sales per Desk Salesperson, split in "created and owned" and "involved" sales. Upper-level managers also only received aggregate level data on Desk Salespeople's reported saleswork. Moreover, the way DeskSales' General Manager's designed the reports received by upper-level managers using Microsoft PowerPoint

presentations, made any attempt to scrutinize Desk Salespeople's actions in close detail a very difficult endeavor.

DeskSales' General Manager supervised Desk Salespeople's work in much the same way. Desk Sales Managers prepared weekly reports for the unit's General Manager, which summarized their team's reported sales and saleswork for the week. These reports were created in a Microsoft Excel spreadsheet. However, these spreadsheets did not include links to Siebel, making details about reported sales and saleswork difficult to scrutinize. DeskSales General Managers only used these reports to produce their own Microsoft PowerPoint-based reports to upper-level managers and thus saw no reason to scrutinize the formal representation of Desk Salespeople's sales and saleswork.

Upper-level managers and the DeskSales' General Manager did not know and did not check that most reported customer calls were logged in Siebel at the time of Wednesday's audiocalls, a few hours before weekly sales and saleswork reports were created by Siebel. Siebel, of course, was designed to be a self-entry information system. Employees had to use Siebel to log their work for Siebel to produce accurate formal representations of work. However, upper-level managers used reports from automated work reporting systems in much the same way. Eytel recorded Desk Salespeople's calls automatically, but Carmen only required and only had access to aggregate statistics, such as the total number of calls and the total time each Desk Salesperson spent on the phone. Desk Salespeople could thus call their friends, their family, pre-recorded E-Tel conferences, and each other to reach their call targets. One Desk Salesman reported that Desk Sales Managers started to hold morning team audiocalls to help their Desk Salespeople hit their talk-time target.

Upper-level managers and the DeskSales' General Manager used formal representations of Desk Salespeople's work at face value. In their reports to the managers above them, they used reported sales and saleswork as if they were automatic, computer-generated formal representations of work. As Mariah, the second General Manager to head DeskSales put it, it was because formal representations of work were generated by Siebel – a shared and automated reporting system – that these representations were credible performance assessment tools.

For Desk Sales Managers, Siebel was a reporting tool. E-Tel's information systems were a window into their team's work. But not just any kind of window. These information systems were their team's "shop window." A representation that Desk Sales Managers could shape through their Desk Salespeople's reporting work. Desk Sales Managers used this interpretation when enacting their own managerial practices in response to their own experience of the first-line manager's dilemma. Desk Sales Managers had to make their Desk Salespeople create a representation of compliance with sales and saleswork targets while knowing that their Desk Salespeople were not able, and more often than not, were not willing to do the sales and saleswork needed to ground such formal representations. Desk Sales Managers addressed this challenge by having their Desk Salespeople use Siebel to create a formal representation of sales and saleswork without doing the sales and saleswork to match that representation. Desk Sales Managers were able to enact this tactic successfully because the unit's General Manager and upper-level managers interpreted formal representations of work in Siebel as computer-generated, allowing Desk Sales Managers and Desk Salespeople to use these representations as human-generated. The use of Siebel as a self-entry information system thus allowed Desk Sales Managers to have Desk Salespeople produce a representation of compliance without actually complying with sales and saleswork targets.

The visibility of Desk Sales Managers' use of Siebel hinged on the way the DeskSales' General Manager and upper-level managers used and interpreted these computer-generated formal representations of work. If these representations were interpreted as automatic outcomes of an information system used to show compliance upwards, not supervision downwards, these representations were not scrutinized and could thus be empty of any actual sales and saleswork.

5. Loose coupling, not tight coupling, between work and its representation

The fifth contribution that my analysis of Desk Salespeople's experience makes to an alternative view of agency in the production of computer-generated formal representations of work is to explain how the distance between work and its representation is an outcome of agents' use of information technology. Making this point entails two tasks. The first is to explain how Desk Salespeople could create a representation of sales and saleswork without actually engaging in either. The second is to show how Desk Salespeople were able to engage in service work without creating a formal representation of such work.

The first task has been attempted in the previous four points. The second task requires explaining how Desk Salespeople were able to engage in service work without creating a representation of that service work in Siebel. The literature on IT and organizations has shown that employees use information systems to scaffold the coordination of their work across time (Hutchins, 1991). Because the information system that managers use for supervision is typically the same as the one employees use to scaffold their work, employees' work – prescribed or not – is inevitably open for scrutiny (Orlikowski, 1991). Desk Salespeople needed an information system to scaffold the coordination of their service work across time, but they were able to improvise such a system without making their service work visible to upper-level managers.

Desk Salespeople dealt with the service requests that customers sent to field salespeople in exchange for field salespeople's permission to report part of field salespeople's sales as their own. Desk Salespeople, however, did more work in service requests than field salespeople. Field salespeople forwarded service requests to Central Service and often told customers to call Central Service themselves. Desk Salespeople oversaw service requests personally, monitoring their progress and enacting tactics to speed up work on their customers' service issues. Desk Salespeople's goal was to build personal ties with their customers, so that they would place orders directly with Desk Salespeople. Desk Salespeople could then report these orders as the outcome of their own saleswork.

The effort that Desk Salespeople put into managing their customers' service issues took over most of Desk Salespeople's time at work. Desk Salespeople often had a large enough portfolio of service issues to require an information system to keep track of their outstanding service work. Moreover, service issues were complex enough to require an information system to store all the information required to oversee those service tasks. The current literature on IT and organizations would suggest that Desk Salespeople would improvise with Siebel to scaffold their service work (Gasser, 1986). However, Desk Salespeople did not do so. Desk Salespeople drew on their Desk Sales Managers' use of Siebel to interpret Siebel as a "representation tool." Desk Salespeople did not interpret Siebel as a resource that they could draw on when improvising the information system that they needed to coordinate their own service work across time. The use of Siebel to create a formal representation of compliance was of consequence to Desk Salespeople's interpretation of this information system. Desk Salespeople kept Siebel at the margins of their everyday service work because Siebel embedded their managers' interests in producing a formal representation of compliance. It did not serve Desk Salespeople's interests in managing their

customers' service work. Instead, Desk Salespeople improvised their own information system to coordinate their service work across time. Desk Salespeople's used hybrid local representations of their work such as annotated printed email messages and paper-based to-do lists to keep track of their outstanding service work. This improvised, paper-based information system mimicked many of Siebel's features. However, it differed from Siebel in one important point. It embedded Desk Salespeople's interests, not managers' interests. This local information system was thus more 'ready-at-hand' for employees and less so for managers. Desk Salespeople often complained of the difficulty of scaffolding the coordination of their service work in Siebel. It was difficult to make Siebel their own. However, Desk Salespeople's local improvisational information systems made supervising their service work very difficult. Only by exerting a considerable amount of effort could Desk Sales Managers hope for some level of visibility over this work. For upper-level managers the commitment of time and resources would require extensive improvisation. Supervising Desk Salespeople's service work would entail going through Desk Salespeople's paper-based to-do lists, which were as likely to be on a single sheet of paper as they were to be spread across of a number of small post-it notes spread across Desk Salespeople's computer screen, their paper calendar, their desktops and even their wallet. In alternative managers wishing to supervise Desk Salespeople's service work could also go through Desk Salespeople's printed and on-line email messages and find out which of these messages corresponded with completed work and what messages to played a pivotal role in these local improvised information systems. It kept them away form scrutiny and from having to be reported on. The use of Siebel created a façade of compliance that kept managers' scrutiny away from Desk Salespeople's service work.

6. Representation work aiming outward, not upwards or inwards

The sixth and final contribution that my analysis of Desk Salespeople's experience makes to an alternative view of agency the production of computer-generated formal representations of work is to specify representation work as aimed outwards, not only upwards or inwards.

The literature on information technology and organizations has focused on the use of formal representations of work along two paths. One path, which was also discussed in the previous five points, is the vertical path that takes formal representations of work up the hierarchy. The current literature describes this path as downward flow of supervision (cf. Dandeker, 1990). Desk Salespeople's experience describes it as an upward flow of represented compliance.

The other path for formal representations of work studied in the literature is the circular path of shared visibility among co-workers. The current literature on IT and organizations argues that when managers use computer-generated formal representations of work to show employees' performance to each other (Sewell, 1998), feelings of shame will ensue and compliance with prescribed rules, roles, procedures and goals will be ensured. Desk Sales Managers attempted to create this same effect with whiteboards, but with one important difference. They intended whiteboards to be used by Desk Salespeople to engage in representation work, not in actual sales and saleswork.

There was, however, a third path through which representations of Desk Salespeople's work flowed. Desk Salespeople could not address their customers' service issues on their own, they needed the help of E-Tel's service units. Desk salespeople were able to enact multiple tactics that allowed them to use enduring or spot personal ties to enlist the cooperation of E-Tel's service units for part of their service work. However, some of Desk Salespeople's most

important service tasks required Desk Salespeople to improvise with formal representations of their work to enlist the help of E-Tel's service units. Desk Salespeople represented their service work according to the genres used by service units to ensure that service units would act on Desk Salespeople's customers' service issues. Desk Salespeople's use of E-Tel's Escalation unit's business case form is a telling illustration of this horizontal representation work. Desk Salespeople were able to represent their customers' service issues in this formal representation in a way that had E-Tel's Escalation Unit address issues that were below its requirements for escalations. While Desk Sales Managers had Desk Salespeople create a façade of compliance to earn the approval of upper-level managers, Desk Salespeople created a façade of service work to trigger the unprescribed cooperation of E-Tel's service units. This extended representation work from formal representations for control to formal representations for coordination.

Coda: An alternative view of agency in the production of computer-generated formal representations of work

Desk Salespeople's experience with using Siebel to produce a formal representation of compliance to upper-level managers suggests an alternative view of agency in the production of computer-generated formal representations of work that complements the dominant view of the role of agents in this process. Although the dominant view of the production of computer-generated formal representations of work was outlined in Chapter 2, it is useful to summarize it here before contrasting it with the view of this process resulting from my study of Desk Salespeople's experience at DeskSales.

The dominant view of the production of computer-generated formal representations of work hinges on the assumption that work and its formal representation on information systems are tightly coupled. This assumption has two corollaries. One is that managers use computer-

generated formal representations of work to supervise work down the organization. The other is that employees have agency over these representations because these are generated by information technology as employees use it in the course of their everyday work. This view places deviance squarely with workers and establishes access to information as the core element of the struggle for power in organizations. However, studies of the production of computer-generated formal representations of work that follow a structurational approach to IT suggest that the tight coupling between work and its formal representation is dependent on the everyday practices of managers and employees. This tight coupling is thus not a feature of technology but a consequence of people's actions (cf. Orlikowski, 1991).

I want to suggest that Desk Salespeople's experience explains how a different role for agency in the production of computer-generated formal representations of work can emerge and be sustained. At DeskSales, work and its representation in Siebel were, at best, loosely coupled. Desk Salespeople could produce a representation of compliance with sales and saleswork targets without any sales and without engaging in any saleswork. Desk Salespeople could spend their working days doing service work and not the slightest trace of it would be visible in Siebel. Desk Salespeople's experience suggests that Desk Sales Managers and Desk Salespeople participated in the production and reproduction of the distance between work and its representation. The literature on IT and organizations argues that managers' goal is to supervise work down the hierarchy (Dandeker, 1990). Because of that, this literature suggests that managers will use the powers of scrutiny afforded by computer-generated formal representations of work to their fullest extent – enforcing compliance with prescribed rules, roles, procedures and goals to have positive formal representations of their employees work (Garson, 1988). Employees play an important role in reproducing this pattern. If they choose to forfeit their prescribed use of the

information system, there is little that managers can do to set a close surveillance, no matter what the technological possibilities are. But it is managers who frame employees' conditions for action. My research at DeskSales shows that managers can enact an alternative set of practices. Managers can use computer-generated formal representations of work to show compliance upward and forfeit scrutiny except when employees are not representing compliance. When enacting such a set of practices, managers produce condensed, closed summaries of the work of lower-level managers below them and the work of their employees. The goal is to make scrutiny more difficult and less likely.

Under such conditions, managers can focus exclusively on enforcing representation work – the work of producing a representation of compliance with prescribed roles, rules, procedures and goals, without actually complying with any of these. Managers can use their own improvised information system to enforce representation work by supervising down based on informal representations of work. This pattern of production of computer-generated formal representations of work widens the gap between work and its representation. When that gap is wide enough, representation work goes beyond the mere reporting of action that has not taken place.

Desk Salespeople placed calls to their customers, not to make sales, but to respond to service issues. There was then only a gap in purpose between their calls to engage in service work and the representation of those calls as saleswork. The distance between representing their work as selling to customers and barely making any sales was wider and thus required a constant effort in service work. Only in this way were Desk Salespeople able to get the help of other parts of E-Tel in maintaining the façade of compliance that their managers demanded.

The view of the production of computer-generated formal representations of work that I inferred from Desk Salespeople's experience at work is not a replacement, but a complement to

the dominant view on this phenomenon. Desk Salespeople's experience and that of the research settings featured in the current literature on IT and organizations are two patterns that are produced by the same process, a process that hinges on the tightness of coupling between work and its representation in computer-generated formal representations of work, as determined by managers' and employees' practices.

This view on the role of agents in the production of formal representations of work not only contributes to research on IT and organizations but also to social studies of practices. Specifically, my analysis of Desk Salespeople's experience at DeskSales shows that agents can shape the extent to which their practices are visible to others by regionalizing spaces of interaction into façades. This complements the current focus of social theory in the regionalization of spaces of interaction into front stages and back stages to shape the visibility of agents' practices.

ON FAÇADES AND THE VISIBILITY OF ACTION

My analysis of Desk Salespeople's experience at DeskSales suggests that the core problem of the unit was managing the visibility of work. The DeskSales General Manager and Desk Sales Managers focused their efforts on making their Desk Salespeople create a representation of compliance with sales and saleswork targets while hiding their representation work. The problem of the visibility of work at DeskSales is an instance of one of the central problems in the social study of practices – the visibility of action. My analysis of Desk Salespeople's experience contributes to this literature by adding a pattern of regionalization of spaces of interaction to the pattern most often discussed in the literature: the production and reproduction of front stages and back stages. Desk Salespeople, Desk Sales Managers and the

DeskSales General Manager enacted a different pattern of regionalization of spaces of interaction – the production and reproduction of a façade. When regionalizing spaces of interaction into a façade agents shape others’ interpretation of the interaction in that space as allowing them to observe agents’ practices while using that space to create a representation of practices that does not correspond to their actual action.

The current research on the visibility of practices focuses on the production and reproduction of front stages and back stages as the dominant tactics to shape others’ visibility of an agent’s practices. When regionalizing spaces of interaction into front stages, agents produce a set of norms that define that space as a place where agents’ practices are visible to others. When regionalizing a space as a back stage, agents produce a set of norms that define that space as a place where agents’ practices are hidden from others.

My analysis of Desk Salespeople’s experience at DeskSales suggests that spaces can be regionalized as façades. When regionalizing a space of interaction as a façade, agents produce a set of norms that define that space in two different ways. In the audience’s interpretation, the space of interaction makes agents’ practices visible. In the agents’ interpretation, the space of interaction allows them to display a representation of their practices that does not correspond to their true action. At DeskSales, Siebel was regionalized as a façade. Upper-level managers used Siebel as a window into Desk Salespeople’s everyday work. But for the DeskSales General Manager, Desk Sales Managers and Desk Salespeople that window was a “shop window.” Siebel gave upper level managers visibility of a representation of compliance with sales and saleswork targets that was not grounded in actual sales and saleswork.

The DeskSales General Manager enacted a set of practices that shaped upper-level managers’ use of Siebel as a transparent representation of Desk Salespeople’s work. The

DeskSales General Manager reported monthly to upper-level managers on the unit's performance. These reports were based on Microsoft PowerPoint presentations which summarized the sales and saleswork that Desk Salespeople reported in Siebel. The DeskSales General Manager thus relied exclusively on Siebel to present the unit's performance to upper-level managers. Upper-level managers used the figures in these reports when preparing their own reports for their own managers, reproducing the regionalization of Siebel into a façade. Indeed, upper-level managers never scrutinized the information on the DeskSales General Manager's reports. They took these reports at face-value as accurate representations of the amount of sales and saleswork accomplished by Desk Salespeople.

Desk Salespeople and Desk Sales Managers had a different interpretation of Siebel.

For Desk Salespeople, the representation of compliance with sales and saleswork targets they created in Siebel was a fabrication that had little connection with their "real [service] work" except as their motivation to engage in service work. Desk Salespeople reported their expectation of a "day of reckoning" when DeskSales would be uncovered for what it truly was – a service unit creating a façade of compliance with sales and saleswork targets without actually making sales or engaging in saleswork. Creating a representation of compliance in Siebel was "crap work" or "admin work", a nuisance in Desk Salespeople's everyday experience at DeskSales.

For Desk Sales Managers, Siebel was their Desk Sales Team's "shop window." It was the locus of surveillance of their Desk Salespeople's representation work but it was also a resource for their own political maneuvers. The representation of compliance with prescribed sales and saleswork targets afforded Desk Sales Managers face time with upper-level managers – an opportunity to join informal networks of influence and thus advance one's career at E-Tel. Desk Sales Managers' interpretation of the representation of their Desk Sales Team's work in Siebel

was close to that of their Desk Salespeople. Desk Sales managers were, after all, enforcing their Desk Salespeople's to do representation work. For Desk Sales Managers these representations of compliance were only a façade that they had their Desk Salespeople create, but a façade that allowed Desk Sales Managers to ensure that they received their bonus and improved their career prospects.

Together, the articulation of an alternative view of the role of agency in the production of computer-generated formal representations of work and the articulation of the 'façade' pattern of regionalization of spaces of interaction, constitute this study's contributions to the management literature and to the broader literature on social theory. The next and final chapter concludes by tying this study together and discussing its implications.

CHAPTER 8: CONCLUSIONS ON MAKING THE NUMBERS AND THE CREATION OF ELECTRONIC FACADES

There is a theme that has persisted across the history of organizational research: the prevalence and the importance of unprescribed work in organizations (Blau, 1955; Burawoy, 1979; Cleverley, 1971; Dutton, Ashford, O'Neill, & Lawrence, 2001; Gouldner, 1954; Roy, 1960; Van Maanen, 1973). Organizational designs need to be adapted to the everyday idiosyncrasies created by customers and clients (Lipsky, 1980) and stakeholders (Crozier & Thoenig, 1976). Employees play a central role in this adaptation, not only by benefiting the organization (Selznick, 1949) but also for their own benefit (Mars, 1983). Unprescribed work has thus been a frequent object of scrutiny of organizational researchers. Self-proclaimed management gurus have also consistently heralded the benefits of unprescribed work for organizational renewal and survival (e.g., Peters & Waterman, 1982).

With the advent of the informed organization (cf. Zuboff, 1988), employees ability and motivation to engage in unprescribed work seem to be in jeopardy. The dominant view on managers' use of information technology in contexts of computer-mediated work is that managers use information technology to scrutinize employees work (Dandeker, 1990). According to this view, employees interpret managers' supervision practices as reducing their ability to deviate from prescribed goals, roles, rules and procedures, even for the benefit of the organization (Garson, 1988; Sewell et al., 1992). This interpretation of their experience as being under constant supervision at work not only reduced employees' ability to engage in unprescribed work practices, but also their very willingness to do so. The possibility of constant scrutiny created by managers' use of information technology is enough to foster an interpretation

of being under constant surveillance. The sense is that any attempt to deviate from prescribed roles, rules and procedures will be immediately detected and punished (Sewell, 1998).

A few studies have shown that managers can use computer-generated formal representations of work to supervise the outcomes of their employees work but not their work process. Orlikowski's (1996) study of the implementation of a service tracking system and the ethnomethodological literature on the use of computers for complex tasks (Heath et al., 2000; Suchman, 1992) has shown that employees can have significant discretion over their work process because managers' are chiefly concerned with outcomes. In such conditions, employees can engage in unprescribed work practices as long as they meet prescribed goals.

My research builds on these studies by showing how employees and low-level managers can engage in unprescribed work that does not contribute towards their organization's prescribed goals, even in a context where work and its supervision are computer mediated. I showed that employees and low-level managers at DeskSales were able to use information technology to shape the computer-generated formal representation of their work. I also show, however, that the way employees and especially managers' use information technology to this end can create challenges that require much more effort to produce formal representations of work than the simple entering of information in the organization's prescribed information system. The centrality of agency in computer-generated formal representations of work, as I explain it here, allows for at least two strategies of 'information'. One is that documented in the literature on information technology and organizations – the surveillance strategy. In this strategy, managers use information technology to have visibility over their employees work. Managers use that visibility to enforce compliance with employees' prescribed goals, roles, rules and procedures through surveillance and discipline. The other strategy – the façade creation strategy – is

articulated in this study. In this strategy, low-level managers use information systems to showcase their employees' compliance with prescribed goals and procedures to the managers above them. To do so, low-level managers enforce their employees' representation work – the work needed to use information technology to create a representation of compliance with prescribed goal, roles, rules and procedures. That was the case at DeskSales. Desk Sales Managers and the DeskSales General Manager used Siebel, the company's prescribed information system, to showcase Desk Salespeople's compliance with sales and saleswork targets to E-Tel's upper-level managers. At the same time, the DeskSales General Manager and Desk Sales Managers used their own improvised supervision systems to monitor and enforce representation work on their Desk Salespeople. They had their Desk Salespeople use Siebel to report sales and saleswork, although Desk Salespeople interpreted their role as lacking the conditions (and themselves as lacking the skills) to do either. Creating a representation of compliance with saleswork targets was easy. It was just a matter of reporting customer calls in Siebel. Creating a representation of compliance with sales was more difficult. Desk Salespeople needed to get the permission of field salespeople to report field salespeople's sales as their own. Because of that, Desk Salespeople took on field salespeople's service work in return for field salespeople's permission to report field salespeople's sales as the outcome of Desk Salespeople's saleswork. This created two challenges for Desk Salespeople. First, they needed to build an information system that kept their service work visible to themselves, so that they could coordinate it across time, but invisible to upper-level managers so that DeskSales' façade of compliance with sales and saleswork targets was not challenged. To these ends, Desk Salespeople improvised a paper-based information system that allowed them to scaffold the memory of their outstanding service tasks and the information they needed to complete them.

Second, Desk Salespeople needed to enlist the cooperation of E-Tel's service units without having any formally prescribed ties to those units. Desk Salespeople improvised a set of personal and impersonal tactics to achieve that cooperation, successfully co-opting these units to help them in their service work.

My main ambition in this study was to complement the dominant view of managers' use of information technology by showing that managers not only use this technology to supervise downward but they also use it to showcase their employees' work upwards. In attempting this contribution, I have made three other contributions to the study of information technology in organizations which come from the three analytical cuts of my ethnography at DeskSales. First, I have articulated the first-line managers' dilemma in contexts of computer-mediated work and supervision. At DeskSales, first-line managers faced a strong bureaucratic push created by ambitious sales targets and a strong improvisational pull created by their employees' inability and unwillingness to sell. I showed that first-line managers did not follow any of the dominant strategies documented in the literature, enforcing goals and rules or supporting their employees improvisations (Gouldner, 1960; Orlikowski, 1991; Orlikowski, 1996). Instead, I showed that first-line managers at DeskSales enacted a façade-creation strategy: they limited the bureaucratic push to a push to create a representation of compliance with prescribed targets and the improvisational pull to a pull to motivate and make employees create that representation of compliance.

Second, I showed how employees were able to address the self-coordination challenges involved in working under an unstructured workflow. Desk Salespeople had no prescribed or unprescribed rules and procedures to prioritize their service tasks. Desk Salespeople also had no information system to scaffold the memory of their outstanding service tasks and the memory of

the information needed to carry out those tasks. Desk Salespeople used the importance of their service tasks for their customers and their customers' persistence to prioritize their service work. Desk Salespeople used paper to-do lists and annotated email printouts to scaffold the memory of their service tasks and of the information needed to complete them. As I interpret them, these practices reveal the three main challenges in the self-coordination of unstructured work and a set of specific practices to address those challenges.

Third, I showed how Desk Salespeople were able to enlist the unprescribed cooperation of other E-Tel units under adverse conditions for establishing personal ties with these units. I showed that Desk Salespeople were able to improvise a one-to-one communication channel by using a one-to-many communication system to enlist the cooperation of Central Service representatives for some of their non-routine service work. I also showed how Desk Salespeople were able to enlist the cooperation of E-Tel's specialist service representatives through 'spot' personal arrangements that were not supported by enduring personal ties. I also showed how Desk Salespeople were able to use impersonal mechanisms to enlist the cooperation of E-Tel's service units. By doing so, I showed that unprescribed cooperation can be achieved through means other than enduring personal ties.

Taken together, these three contributions add to the literature on unprescribed work in organizations by providing an account of unprescribed work motivated by first-line managers and by showing how unprescribed work is coordinated through time (self-coordination) and space (unprescribed cooperation).

The contributions that my research makes to organizational theory can be translated into contributions for managerial practice. My interpretation of the façade-creation strategy is relevant to understanding one of the most common practices in organizations: management by

objectives. The dominant view in the managerial literature on management by objectives (e.g., Drucker, 1993) is that linking desired behaviors with measurable objectives will promote those behaviors. As Deming (Deming, 1986: 40) emphasized when summarizing this approach, “what gets measured gets done.” At DeskSales, linking sales and saleswork behaviors with measurements promoted the representation of compliance with those behaviors. At DeskSales, “what got measured, got showed [i.e., represented].” My research at DeskSales suggests that upper-level managers should be aware of façade-creation as a viable strategy to respond to management by objectives. If lower-level managers and employees enact such a strategy, then upper-level managers will be rewarding the creators of a representation of compliance but not compliance itself.

My analysis of Desk Salespeople’s self-coordination practices also contributes to managerial practice in two ways. First, in the same line as Malone (1983), I have provided a list of possible specifications for self coordination systems in organizations. I have shown that these systems need to perform three main tasks: provide criteria to prioritize work, provide a material resource to scaffold the memory of outstanding work, and provide a material resource to scaffold the memory of the information needed to accomplish these tasks. I have further specified some of the features of these two material resources. The material resource needed to scaffold the memory of outstanding tasks needs to be able to link task descriptions to task priorities and to task deadlines. The material resource to scaffold the memory of the information needed to complete outstanding tasks needs to be able to accept free-form comments on representations of communication such as electronic mail messages and to organize tasks in a ‘stack’ whose order can be freely manipulated by the user. I have also shown that employees can draw on their managers’ use of information technology to interpret that technology as a managerial tool and

exclude it from their everyday practices. At E-Tel Siebel was little more than a very expensive way to create a façade of compliance with prescribed sales and saleswork targets.

Finally, my analysis of Desk Salespeople's unprescribed coordination practices opens up managers' toolset to foster unprescribed cooperation in organizations. The managerial literature has focused on social gatherings as the main tool to foster that type of cooperation (e.g., Deal & Key, 1998). The assumption is that these events foster the spontaneous creation of personal ties which employees can then draw on for unprescribed cooperation. This strategy limits unprescribed cooperation to people that can be brought together in face-to-face gatherings – an increasingly difficult and expensive proposition as organizations expand geographically. My research at DeskSales shows that unprescribed cooperation does not require personal ties. It can even be accomplished through impersonal tactics such as using forms.

Taken together, my research provides managers with a rich case of unprescribed work, which can be used to think about how to foster or how to hinder this type of work in their organization.

More important than the theoretical or practical implications that my analysis of Desk Salespeople's experience, is how inspiring Desk Salespeople's success in dealing with the multiple pressures they endured at work for those embarking into endeavors as demanding as a career in academia, where formal representations of work have the power of Salomon's sword over one's career. Publication counts, dissertation awards, and point systems – all are but imperfect representations of what each of us endures for little external reward.

An ethnography is above all a burden. I have the burden of being the carrier of DeskSales' tale and the burden of the duty of telling that tale in a useful way. It is to honor Desk Salespeople's tale, as much as it is to fulfill my own personal goals as an academic, that I have

attempted the contributions to theory and practice outlined above. Sam Gamgee's musings (Boyens, Jackson, Shaye, & Walsh, 2002) on the experience of the main protagonists of the stories that really matter seems thus a fitting closing to this contribution to explain the hidden labors that are behind the everyday work of making one's numbers:

It's like in the great stories, Mr. Frodo. The ones that really mattered. Full of darkness and danger they were. And sometimes you didn't want to know the end. Because how could the end be happy? How could the world go back to the way it was when so much bad had happened.

But in the end, it's only a passing thing, this shadow. Even darkness must pass. A new day will come. And when the sun shines it will shine out the clearer.

Those were the stories that stayed with you. That meant something. Even if you were too small to understand why. But I think, Mr. Frodo, I do understand. I know now. Folk in those stories had lots of chances of turning back only they didn't. They kept going. Because they were holding on to something.

APPENDIX

SUMMARY OF THE ANALYSIS OF THE AUDIO-CALLS OBSERVED DURING MARIAH'S TENURE AS DESKSALES' GENERAL MANAGER

Team / Date	Monitor	Enforce	Reward	Advise	Interpret
Retail 2 02.11.12		<p>+ Roy said that figures for reported calls to customers were good and increasing, they were "showing a positive trend". He says that this target needs to continue to be met. "I don't care how you do it".</p> <p>+ Roy continued: "calls to customers, just stick them on Siebel" so that "instead of having to make 25 in the last day of the week, just take two minutes a day".</p>			<p>+ Roy said that "what I am going to go for is for expectations, teamworking and setting an agenda". He said that "we have easy targets: the more money you make, the more money I make", he added: "that's what we're here for at the end of the day".</p> <p>+ Roy says that Todd is on the rising stars program which meant a lot of face time with upper-level managers. Roy concluded that "the opportunity is there for you". He said that "if you want to do 9 to 5, that's great", he did not care either way.</p> <p>+ Roy emphasized "there is going to be more and more focus on Siebel".</p>
Retail 1 02.11.22	<p>+ Andrew started: "Tara, shall I start with you girl". Tara told the team about the open sales she was able to get credit for. She told the company name, the product that was being</p>		<p>+ Andrew said that 7 of the top ten opportunities on Siebel are owned by the team. He said that "[Our CEO] recognizes that it is from you guys that the next crop of team leaders</p>		

	<p>sold with and the contract value. Judy said that she had Siebel training "and that's basically it", Joe added "I'm there with you". Thomas said that he had an audio conference with his account team. And John said that he had a probable deal with a restaurant. Michael said that he was "just catching up, really." Jeffrey said that he was working on a 2 megabit deal. Andrew nodded approvingly.</p>		<p>and sales managers is going to come". He says that "he is asking about everybody individually and that he's not doing that for the other teams". Andrew said "you're always in the spotlight and that's good". He continued: "[the CEO] also talks about you to the top team", "so well done".</p>		
<p>Finance 2 02.12.05</p>					<p>+ David asked his Desk Sales Team to gather around him. He explained the changes in the structure of DeskSales to his team members. + David talked about the upcoming versions of Siebel, that are browser based and that have a set of "neat" features that allow more and more of people's activities to be encompassed by the system.</p>
<p>Finance 2 02.12.10</p>		<p>+ David said that "last week the call stats were shit". He said that he needed a reason to explain this in the audio call that was going to be held to review those stats later in the afternoon. A couple of people suggested that it was because last week all of them were on training.</p>			
<p>Retail 4 02.12.12</p>	<p>+Ferdinand then asked what products people were "doing". Laura went first and [said] "WANs, WANs, WANs" Nancy [...] said that she was</p>	<p>+ Ferdinand told his Desk Salespeople that they needed to get their account plans on Siebel and they need to put their name and details there: "we need to</p>	<p>+ Marcia asked if there was any recognition. She then said that they probably should recognize Eric for the new lead table he created. Some Desk</p>	<p>+ Ferdinand warned his Desk Salespeople not to become dependent on large switches. This is a good product when they are targeted on contract</p>	<p>+ Ferdinand said that the daily target achievement information is for their own orientation. He warned that the weekly information on target</p>

Retail I 03.01.07	<p>pretty much selling network infrastructure. + Ferdinand asked his Desk Salespeople how was their product knowledge. Laura and Nancy said that theirs was good. Nancy said that they don't need any more training.</p>	<p>chase our account managers and [field sales] team", "we need to make sure that they're happy with us updating them [the account plans]"</p>	<p>Salespeople applauded quietly and Eric explained how his new lead table worked.</p> <p>+ Larry reported that yesterday Andrew had a short conversation with his Desk Sales Team telling them that they were going to use the whiteboard to set up a hierarchy among the team members based on the value of the biggest lead they put in Siebel. Each of the Desk Salespeople on the team was to pick a rugby team and they will get scores</p>	<p>value but he says that they will be targeted on NIBR sometime next year and large switches have zero NIBR.</p>	<p>achievement went to E-Tel's senior managers and there was a weekly call where each of the Desk Sales Managers had to explain why they did not reach their targets. + Ferdinand said that sales and saleswork numbers are fed back to senior managers. He also stressed that not only are poor performers mentioned, but also are over-achievers. He said that "(Siebel) measures the way we do business and how successful we are" and that they are "completely transparent", and that was one of its major advantages. + Ferdinand concluded that "everything we do is highly visible, it's fully on the radar".</p>
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Retail 1 03.01.13	<p>+ Desk Salespeople then reported on their work.. When it is Jeffrey's turn to speak, he said that he was just chasing up some orders for his customer. [...]. Andrew asked Toby if he was still in training. Toby replied that he was. Andrew then called Larry, who said that he was doing some work for his account team. Jo said that he was putting together a form for his customer for them to keep track of their orders. [...]He said that the Siebel record for the \$2 million sale for one of his customers was about to be closed.</p>		<p>just like rugby depending on the value of their leads.</p> <p>+ Towards the end of the call Andrew asked everyone the name of the rugby team they wanted to represent and told them that the rule was that the person who would win would be the one with the most new sales records in the week.</p>	
Retail 2 03.01.14				<p>+ Roy announced their targets and said "these are not negotiable." Roy said that the team was going to be divided in two sections, one headed by Todd and the other headed by Karl, "to foster some competition".</p>
Retail 4 03.01.15	<p>+ Ferdinand said "Looking at these reports", there were not a lot of new contacts in Siebel, "Laura and Marcia have been with their accounts for long and there are not really a lot of</p>	<p>+ Ferdinand said "If you have big opportunities, pay attention to close dates and flag me if they get moved to next quarter," so that ("I can't promise") he could reduce people's targets</p>		

	<p>new people to put in.”</p> <p>“Kyle, 12 contacts, have you tried to update accounts or anything”.</p> <p>“Oscar you’ve got 21 on it and you’re adding quite a lot”. “Peggy?” Peggy answered “to be honest, I really didn’t do anything.”</p> <p>+ Ferdinand said “OK, ‘calls to customers’, from the beginning of the fiscal [year]”, the whole team did 380. Ferdinand said that this figure “looks quite healthy”, “the numbers are all quite respectful, going through them”.</p> <p>+Ferdinand said “try to keep it relevant”, “I don’t want Siebel clogged” with irrelevant information.</p> <p>“You would want to add on a call from a customer clarifying what that quote was”. He is quick to add: “Don’t make your numbers plummet because of that”, though. [...] “hit 10 and then worry about relevance after.” Ferdinand said that to reach targets the boundaries can be “stretched” but then they should “retract.”</p> <p>+ Ferdinand then announced the total</p>	<p>accordingly. “Just keep on top of that guys”.</p> <p>+ Ferdinand said “When people from management come down you should now this so that you can tell management so that we’ll look good.” He read everyone’s reported sales in Siebel, “keep on top of those expected closed dates”. Kyle has 5 million worth of opportunities, which bring him “extra pressure”.</p>		
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	<p>revenue figures for each DBAM. Laura has 5 million, "well done". Oscar "hot on your heels", Ferdinand added to Laura. Peggy made 100 000, but there's a lot of stuff that's under Laura's name for which Peggy did most of the work. [...] Peggy said she was only doing a specific product any way, dividing the account with Laura based on product. Kyle got 67 000, "well done". Nancy, has "lots of quotes" but she needs to "translate them into [closed sales] in Siebel". [...]He continued to read through the revenue numbers: Don has 800 000 [...]Christine had 1.5 million: " Christine is really storming up now, well done Christine ". Ferdinand said that the team as a whole had brought in 10 million of revenue.</p>				
Retail 2 03.02.05					<p>+ Roy explained to his Desk Sales General Managers' how they should use Siebel to increase the system's accuracy.</p> <p>+ Ferdinand addressed the bonus issue and said that he had good news. Richard</p>
Retail 4 03.02.06					

Retail 3 03.02.13	+ Nina then said that it was time to go through the open sales records. Nigel said that "I will be sorting my DSL" and that he would be chasing some orders. Frank said that he would be "chasing orders". He also said that he was going on a customer visit tomorrow and that "I closed the PSTN deal yesterday". Jeremy said he had nothing going on. Lee said he was "just chasing some orders".				said that he couldn't discuss specifics because he didn't have the information, but that they wouldn't be disappointed. + Nina announced that 20% of their bonus was going to be held until the results of the customer satisfaction survey came up.
Retail 3 03.02.19	+ Nina told her Desk Salespeople that they had to be careful when putting the initial cost of a contract in Siebel: "the initial cost is the same as the NIBR for this year". She repeated this a few times, to make sure that it was clear for everyone. + Dennis said that there were a lot of large open sales for his accounts in Siebel and asked Nina how he could get some of the credit for those sales. Nina told the story of how Robert, another Desk Salesman on her team, got involved in a 8.6 million dollar opportunity that was about putting E-Tel Broadband access CDs on a retailer's stores. Nina explained how Robert's involvement was limited to calling the stores to make				

<p>Technology and Media 2 03.02.24</p>	<p>+ Anthony called started by calling Gregory: "what's the scores on the doors for you today?" Gregory said that his open sales were still far from closing. Anthony then called Kevin, who replied: "I'm just catching up on stuff". Anthony retorted: "that's very specific Kevin" and laughed. Anthony then called Edward and then Lena, who both said that they had nothing to report. Anthony then called Alexander who said that his open Siebel sales records were far from their close date. [...] Alexander said that he spoke with one of his field salespeople and that he had gotten permission to report a sale worth 100 000 dollars under his own name in Siebel. He said that his 15 million-dollar open sale was now only due to close in March ("sorry Anthony"), Ron said that the private circuits service unit was preparing a letter of intent for one of his</p>	<p>sure that they got the disks. Nina said that "even making a quote [meaning giving the price of a product] is involvement". + Anthony said: "we need to keep on top of Siebel" and added "can you have a go through your open sales records and make sure there are no errors on them?"</p>			
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<p>Technology and Media 2 03.02.25</p>	<p>customers. He said that he needed to keep on top of a switch order to make sure that it did not "go astray". Then it was Mark's turn, who said that he was "just following up stuff".</p>				
<p>+ Before closing the call, Daniel told Edward that he needed to talk with his customer to find out when the sale was likely to close, "I need to keep our General Manager updated on this".</p>	<p>+ Daniel said that he wanted people to focus on "what are you doing each week to make the sales cycle shorter". Daniel added that the purpose is: "instead of having you swimming around, have a focus on open sales". Daniel asks, "does it make sense?", "will this actually help you?". People say "yeah, yeah".</p>				
<p>Retail 3 03.03.04</p>				<p>+Nina explained that [...] sometimes [some of the product revenue from their accounts] is not visible on ARTS [E-Tel's automatic revenue tracking system]". She continued: "sometimes you get products allocated to your account on ARTS that the [customer hasn't bought] and they [bring revenue]: those ones you want to keep, so keep quiet". Nina explained: "basically, the more you look, the more you'll find and it's a way to get</p>	

Finance 1 03.03.19		<p>+ Linda started it by saying "we're 694k behind on involved, let's try to get some of that business in. She also said that "we're also behind on our reported customer calls".</p>		<p>revenue without having to sell anything. Of course, you will eventually have to sell something, but it's a good way to hit numbers."</p>	<p>+ Linda then read out an email she got from DeskSales' General Manager telling them to "prep the people that are going to sit with [a visiting upper-level manager] and those that are going to dinner with him."</p>
Retail 4 03.03.24	<p>+ Ferdinand went through the list of each DSP open sales and announced the total NIBR for the team.</p>	<p>+ Ferdinand said that "keeping account plans up to date will be the next big push". He said E-Tel's CEO would come soon to the unit, "so make sure that everything is updated".</p> <p>+ Ferdinand said that "another big thing is to pass leads to the specialist team, make sure that you keep the sale's record [under your name], but there's a big push on passing things to the specialist team".</p>		<p>+ The call finished with a conversation about the Indian girl on the specialist team. Ferdinand asked them to "cut her some slack" because she's new to E-Tel.</p>	
Finance 2 03.04.14		<p>+ David told the team that "I can't tell you how important this [reaching the targets] is". He said that Mariah was putting constant pressure on him. David emphasized that the only way out of it is for them to hit their targets. If</p>		<p>+ David told them that they needed to divide their target by the number of weeks in the financial year so that they knew how they were doing each week and to split it 70/30, where 70 is the new technology portion. David said: "that</p>	

		<p>targets are hit, then "we won't be managed so intensely."</p>		<p>sounds easy, doesn't it?" He added that they should get 50% of their target in the first quarter, because companies are shier buyers in the last quarter.</p>	
<p>Retail 1 03.04.29</p>	<p>+ Andrew read values and the descriptions of the sales closed the week before and said that they were going to win to all the other teams if they went on like this. He then asked Judy about what was going on in her accounts and Hannah discussed some of the products that some of her accounts were planning on buying. Richard then proceeded to ask the other Desk Salespeople on the team else and each of them also talked about one or two products their accounts were going to buy.</p>		<p>+ Andrew said that he wanted to talk "about your numbers", he said that "the girls are on top this week", he said that the team's Rugby cup was "dominated by the girls". Jeffrey wandered, "have you been updating them? Am I not in the top anymore?" Andrew said: "haven't you looked at them lately?" He gets up and goes through the first six rows in his league table and tells Jeffrey "you're in sixth", "you won three, drew three and lost one". John was in second: "I am the one who has to put things right then", he said, referring to the abundance of women on the top positions.</p>		
<p>Finance 2 03.05.01</p>		<p>Ronald reported that his team audio-call today was about "Siebel, Siebel and Siebel". Sitting with Stewart, having breakfast, Ronald said, "we're working for Siebel instead of Siebel working for us". Commenting on the</p>			

Retail 1 03.05.02	<p>+Andrew asked his Desk Salespeople the number of calls they had logged in Siebel for the previous week and wrote them on the team's whiteboard.</p> <p>+Andrew learned about Judy's unreported sale.</p>	<p>pressure they've been under to keep a given amount of reporting going on, he said: "the measure becomes the goal!"</p> <p>+ While going through their open sales records in Siebel, Andrew told his Desk Salespeople to focus on new revenue, not contract value.</p> <p>+Andrew told his Desk Salespeople how they should extract their sales figures from Siebel.</p> <p>+Andrew told his Desk Salespeople to remove specialists from their Siebel sales records.</p> <p>+Andrew instructed his Desk Salespeople to go through all the steps in the sales cycle.</p>	<p>+ Andrew awarded the "Golden Salesman" to the Desk Salesperson that reported the largest sale in Siebel.</p>	<p>+ Andrew explained how Desk Salespeople could delay reporting sales in Siebel after reaching their target.</p> <p>+Andrew advised Judy to close an open sale, so that she would take credit and earn the bonus for it.</p>	<p>+Andrew told his Desk Salespeople that they should be ready to answer questions about their sales performance to their General Manager.</p> <p>+Andrew helped his Desk Salespeople understand the need to wear formal attire to E-Tel's summer party as a display of professionalism..</p>
Finance 1 03.05.08	<p>+ Linda said "the targometer is up again and we'll have it running soon". Later in the day, the red bar of the targometer (that now runs until 100 million) was up a notch and there were a couple of names, i.e. colors, were up on each of the rankings.</p>	<p>+ Linda started the audio-call by asking if anyone had seen their CEO's strategy video, "our General Manager says that training is not effective if you don't know the strategy behind it". "I need an email by close of play today, confirming that you have seen it".</p> <p>+ Linda said that "last night our General Manager came up to me to congratulate us on our recovery from almost</p>	<p>+ Linda also said that the bottle of wine was going to be awarded today. Ted asked if it was going to be awarded only to their team or if it could also go to the other Finance team. Linda said that it could also go to the other team. Mark asked if the award was based on this month's sales. Linda said that it was for the whole last quarter, because there were not enough sales made this month. Linda said that, if the award would stay in this</p>	<p>+ Ted asked if he could log in the customer calls he made on Donald's behalf so that the team's target would be kept. Linda suggested "put a note saying that you're doing it on behalf of someone else".</p>	

Finance 1 03.05.13	+ Linda told them that she had sent a graph with their reported sales for the year and called people attention to the spreadsheet above them. She told names of the people that hit their monthly target and those that overachieved that target.	nothing to a lot". "Not only with reported customer calls but also with sales", she added, so make sure that you keep customer calls up".	team, Ruth would have got it.	+ Donald complained about a customer that kept calling him for issues that only field salespeople could address. He told Linda that there were no field salespeople assigned to that account. Linda told Donald to try to deal with the customer's issues.	+ Linda reminded Desk her Salespeople of Carmen's paying double bonus this month.
Technology and Media 2 03.05.15	+ Anthony then asked if there had been any big deals. Ron said that "I have actually reduced a big deal". Laughter ensued and Ron added, "I found a discount I didn't know it existed".	+ Anthony then asked how people's sales plans were going. Each Desk Salesperson on the team replied with a, "all right", spoken with different levels of enthusiasm. Anthony reminded them, "they need to be done by the end of the week".		+ Anne said that "in the last sinners list I got errors that were not there and I had opportunities as having no activity for 60 days that had been closed in January". Anthony told Anne to make sure that she fed this back to the team running the reports.	+ Anthony said that the problem with voice and network engineers was now going to be dealt with at General Manager level and that their General Manager was in a "major fight" about this.
Retail 2 03.05.16	+ Roy said, "let's do our morning ritual" and erased the column his whiteboard with the "customer calls" header and asked people to say how many customer calls they had reported in Siebel yesterday. As people were saying how many calls they had done, Richard was writing them down.				+ Roy gave a 20-minute long presentation using a two-by-two matrix that divided people into four categories. He told them about how Accenture fired its bottom 20% of people every year, "independently of how good you are". He discussed each of the quadrants with them and, when he reached the last quadrant, he said "this is

						the danger zone, this is where you don't want to be".
Finance 2 03.05.19						+ David said that if Desk Salespeople on other teams logged calls to other parts of E-Tel as calls to customers they [Desk Salespeople on her team] could do the same.
Retail 4 03.05.20				+ Ferdinand told his Desk Salespeople that they needed to keep the number of customer calls reported in Siebel.		
Technology and Media 1 03.05.21				+ Josh told his Desk Salespeople that they needed to focus on their sales figures.		
Retail 2 03.05.22				+ Roy told his Desk Salespeople to make sure that they filled the 'competitor' field in Siebel.		
Finance 1 03.06.02						+ Linda explained that their training contingency bonus would be paid next month.
Technology and Media 2 03.06.03				+ Anthony asked them if they'd seen the team stats, "we're up there, we're doing pretty well". He added, "we've taken the dark side [Retail], we're first or second".	+ Anthony then said that "Uncle Chris is coming, make sure that you're aware what's going on in your accounts and you can articulate that".	+ Anthony said "Oh, yeah! There's the summer party. He continued, "there's going to be some rah-rah stuff, but I think it's only for two hours".
Retail 1 03.06.13				+ Andrew made sure that his Desk Salespeople were clear that 'created and owned' opportunities were only those that did not		+ A number of Desk Salespeople on the team complained that this [checking records to make sure there were no

Finance 1 03.06.17		involve people outside DeskSales. He also told people to "check your opportunities everyday to make sure that no field specialist has put their name on them".	+ Linda told Patrick that he had 20 sales plans to do and Simon replied, "I just can't cope". Linda asked Cynthia to help Patrick and Cynthia said that she would. + Linda then added "Roberta sent out the reported customer call figures yesterday, guys." Donald replied immediately, "sorry Linda". Linda said, "I wasn't going to say anything, but now that you mentioned it", and smiled. + Linda said "to make sure you make your bonus, just cover each other's reported customer calls".	+ Linda started the team's audio-call with "a big thank you to Susan for help on sales plans and congratulations to all of those that were able to do some of their sales plans".	specialists involved] was a lot of work and Andrew replied, "I know, I'm as frustrated as you are, Siebel is a CRM tool, not a reporting tool and we're using it as a reporting tool".
Technology and Media 1 03.06.18		+ Josh told them that this was about their payplan and how they should organize their time based on the payplan. He started by saying that "now everyone is putting too much focus on 'created and owned', we need to		+ Josh said that it was important to be aware of their payplan, "if you don't know [your targets], how are we going to hit them?", he asked rhetorically. "Those that know their targets will hit them", he said.	

		focus more on 'involved'.		
Finance 2 03.07.02		<p>+ David announced that they need to do some campaign work for the account teams. Ken, one of the Desk Salespeople in the team, said that Andrew did his best to disguise this was a campaign because it sounds too much like a call center.</p> <p>+ Josh said "we need to keep focusing on sales plans and Siebel errors".</p>		
Technology and Media 1 03.07.07			<p>+ Josh announced pompously that he will give a bottle of champagne to the Desk Salesperson that reported the most open sales on Siebel, "I want proper [open sales records] going on there, not a load of bollocks. I want to see of them actually converted into [closed sales]."</p>	<p>+ Josh said "this week guys, we got the new specialists in. They're purely internal specialists. This is under the radar because they're paid by Finance but they don't have that much work from them so we're using the resource because it's available."</p>
Technology and Media 1 03.07.08		<p>+ Josh called his Desk Sales Team's attention to their poor forecasting. He said that the unit bases its forecast on the open sales logged in Siebel that are due to close within 2 months. He said that most Desk Salespeople have the practice of putting a one-month close date on their opportunities and then keep extending it, which means that forecasting is very inaccurate. Josh said that "we can do better than</p>		

Finance 2 03.07.10		we're doing". He added that "we've done a lot of good work in opportunity management but we need to put more effort into forecasting so that we can all make sure that we're hitting our targets".			
Finance 1 03.07.11	+ Linda said that their team was the best on the floor as far as thoroughness of reporting went and that she wanted the team to benefit from it. Linda said she was having their Deputy Desk Sales Manager give them all a set of queries for them to put on Siebel so that they know at all times how they're doing against their target, "these queries are not only for you to leave there, I actually want you to use them at least once a		+ Linda announced that she had nominated two people on the team to the "Beyond the call of duty" award, which aims to recognize outstanding contributions to E-Tel and outstanding customer service. [...] She said that she was actually going to announce the people she was nominating because "it will be a flavor of what I see as model behaviors".		+ Greg said that on their team audio-call this morning they asked David about the bonus and the double-bubble. David said that he had his own understanding of double-bubble, but that there were other views from management, which could include their bonus being capped and other changes that would save E-Tel money.

Retail 3 03.07.14			<p>+ Nina told her Desk Salespeople that they needed to report seven customer calls a day. Nina told them that they also needed to start to report more sales, "we need to be on double digits every week", he said that he wants them to have 10 new open sales records in Siebel each week</p> <p>+ Nina said that "95% percent accuracy on Siebel is not enough, other teams are getting 100%. We need to raise the bar. That's why you need to be using those queries that Lee [the team's Deputy Desk Sales Manager] sent you yesterday at least once a week". She told them that they should keep focusing on "created and owned" wins, so that "you can forget about and get paid for it, and that'll be a great position to be in."</p>		
Technology and Media 2 03.07.24				<p>+ Anthony said that "Christian [The Technology and Media Top Manager] loves us."</p> <p>"Christian has completely bought into this model [using Desk Salespeople]"</p>	

			<p>and that Christian was “very pleased” with the work they were doing. Anthony pulled out a bottle of champagne and said that “I was dragged on stage and Christian gave me this bottle of champagne and there was a lot of applause”. He added, “you’re the ones doing the hard work, so I want to give this bottle of champagne to you”. He said that he realized that he couldn’t share the bottle of champagne with everyone, so he was going to give it to the person with whom senior management was most impressed, Kevin. Everyone applauded and Anthony handed the bottle of champagne to Kevin.</p>		
<p>Technology and Media 2 03.07.25</p>		<p>+ Anthony said that their General Manager “wants us to forecast for the next quarter”. He said that he was sending a spreadsheet around for Desk Salespeople to fill in with their accounts and the amount they were expecting to close for each account. Anthony said that “I know this is a stab in the dark and I told our General Manager that this would be very inaccurate but the point is to start somewhere</p>	<p>+ Anthony then said that Lena had gotten a great bouquet from a very difficult customer, which Anthony, as her boss, was cc’d on. He asked Lena to read the email but Lena was reluctant. Desk Salespeople on the team insisted and Lena read a couple of lines, “we no longer call her Lena Poole, we call her ‘ray of sunshine’”.</p>		

Retail 4 03.08.15		<p>and refine the process as we go along".</p> <p>+ Anthony said that he didn't have much more to say, "cover the usual Friday stuff, Siebel, make sure sales plans are done, make sure you push back your expected close dates. As far as they're concerned, if you have an open sales record with more than 50% [probability], it's going to close".</p>			
			<p>+ Ferdinand announced that it was time to award "the trophy", "Oscar is not the best performer anymore, although he might be", Ferdinand proclaimed. He said that "this week the trophy is going to someone that has been exhibiting the right behaviors, it's Casey!" Casey raised his arms in sign of victory and the team applauded. Ferdinand handed him the trophy while saying, "we got some feedback on your sales plans that you actually took them seriously, while a lot of the others were taking the piss. Also you had a great turnaround in your [reported sales] in the past</p>		

Finance 1 03.08.28			<p>+ Linda told everyone not to forget that their sector's General Manager was coming in on the 16th [of September] and that "we're going to do it as we did with [their senior sales manager], we'll send the sales plans around so that you can use them to talk with him."</p>	to weeks." Mild applause followed.	
Retail 3 03.09.01	<p>+ Nina asked her Desk Salespeople if they had any sales records in Siebel to close. No one did but for Lee, who had 50K and William said, "I have a biggie but I need to talk with my specialist."</p>		<p>+ Nina asked her Desk Salespeople if they knew what their targets were, "do you know what's the target for created and owned wins on a weekly basis?" A few people mumbled "20K a week" and Josh retorted, "and involved?", "36K". Nina emphasized, "this is what we need to bring every week to be on target." She added that "next week we need to be on 63% target."</p>		<p>+ Linda announced that "we're trialing Contact Central starting in October, which will record everything for you". She added, "it saves you all that crap you have to do of recording inbound calls and outbound calls, it'll do all that admin work for you". Linda said that for it to work, Desk Salespeople needed to start using their 800 numbers instead of their direct dialing numbers.</p>
Retail 1 03.09.02	<p>+ Roy said "knowing that we have a gap of 1 million, we need to have a pipeline of 3 million to make sure that we hit that". With that in mind, he asked if they had "any sales squirreled</p>		<p>+ The meeting ended by Roy going through the numbers on the team's whiteboard and telling Desk Salespeople that although they had been doing a good job, they</p>		<p>+ Nina said, "as I told to you guys the challenge to me is to show to [our General Manager] is to pull back from the spot we are in at the moment, She won't be happy unless we grow by at least more than 10% of what we're doing now."</p>
					<p>+ Roy said, "the hard work has been done we only to convince the account managers that we're better of doing the rest of the work ourselves." He added that "it's also important to</p>

<p>away under the blankets". "Do you have anything that you decided, "let's chuck it away for next month or let's keep this one off the radar", "do we have any sales records below 30% [probability of closing] that we could progress over the value chain in the next month?" He asked everyone individually, by calling their name. Adolph and Barry said that they didn't. Stewart shook his head with a smile, "that was a very shady no" Roy said "do you have one?" Stewart said that he did.</p>	<p>should be really reaching 63% of their sales target for the year.</p>	<p>convey the message that they won't be penalized if they pass this stuff to us because they're paid by revenue."</p>	
<p>Finance 1 03.09.04</p> <p>+ Josh said, "on created and owned wins, we closed 20K. Not massive, considering that we need to close 38K each week [...]". He added, "we need to have this number growing every week". He went on, "we did a little better on involved, mostly because of Scott who closed 496K". He concluded, "this is a pretty quiet week for the team".</p>	<p>+ Josh said that he sent a spreadsheet with all opportunities on Siebel under 75 000 dollars in revenue, "so it can help you focus on some quick wins". He then asked how field sales people reacted when Desk Salespeople "ask[ed] them to get involved in deals [i.e. report closed sales in Siebel as the result of their individual saleswork]". Martin said that he had had some trouble with his field salesperson who was afraid that if it was Martin putting everything on Siebel, his own boss would</p>	<p>+ Josh told them that he should talk with their account teams and explain to them "in a friendly way" that there would be an "exercise where account managers would be drilled on any opportunity they owned that was under 75K".</p>	<p>+ Josh explained that the unit is only paid on this year's new revenue and because E-Tel products are paid in quarterly rentals, this meant that in the second quarter DeskSales will only get paid for the two last quarters of the year and on the third quarter it will only get paid for the last quarter. On the last quarter the unit gets no revenue because all the first payments for products sold in the last quarter are only due the year after.</p>

		<p>asking "how come your Desk Salesperson is doing all these deals and you're not, where's your contribution?!" Josh explained that point of view was not correct, "the point is that field salespeople should not deal with sales lower than 75 000". He added that "they should be doing the higher complexity stuff and we should do the 'donkey work', which we are excellent at doing."</p> <p>+ Josh told them that they needed to go back to reporting 7 customer calls a day.</p>			
<p>Finance I 03.09.09</p>					<p>+ John said that Linda told them that the unit's General Manager wants Desk Sales Managers to get some late forms.</p>
<p>Technology and Media I 03.09.15</p>		<p>Josh called Scott and told him that he was very disappointed. Scott asked how many he was supposed to do and Josh said 35 (Scott was off sick for 2 days). Scott said that he would do the 28 he had left, Josh said that they had to be dated for yesterday or before, and he had to do it before 10 am. Josh complained that when he saw his figures "I nearly</p>			

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