Illuminating Organizing Vision Careers Through Case Studies

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ABSTRACT

Three case studies that illuminate the careers of organizing visions also help us understand important case boundary choices characteristic of this type of research. The choices involve: time frames, cast of characters, action focus, observational means, lines of interpretation, and contextual anchors. We argue that these choices are best regarded as open-ended and provisional, subject to being reconsidered over the course of a study, to maximize insights gained. We relate the choices to major challenges in making cumulative research progress from studies of organizing vision careers.

Keywords

Innovation, organizing vision, organizing vision career, institutionalization, case study research

INTRODUCTION

Case study research has been useful in illuminating the careers of organizing visions as originally described by Swanson and Ramiller (1997). Defined as a "focal community idea for the application of IT in organizations," an organizing vision is theorized as an institutional product of a community's discourse, hypothesized to drive as well as reflect the adoption and diffusion of the innovative products and services that come to be associated with it. The organizing vision's career reflects its construction, elaboration, and refinement over time, and has a characteristic arc, first ascendant as the vision gains notice and the discourse intensifies, then descendant once interest falls off, either because the innovation disappoints and fails to be widely diffused, or because it becomes widely accepted and institutionalized. ERP (Wang and Ramiller, 2009), CRM (Firth, 2001), and Web 2.0 (Gorgeon and Swanson, 2011) provide illustrations of organizing visions that have had high-visibility careers.

How do we account for the different career paths of organizing visions and their roles in facilitating the adoption and diffusion of new IT? Over a decade, a number of case studies have explored aspects of this broad question, seeking to shed light on the answer (see Currie, 2004; Davidson and Reardon, 2005; de Vaujany, Carton, Dominguez-Péry, and Vaast, 2012; Ellingsen and Monteiro, 2008; Fradley, Troshani, Raurpersad, and De Ionno, 2012; Greenbalgh, Procter, Wherton, Sugarhood, and Shaw, 2012; Marsan, Paré, and Wybo, 2012; Schultze, 2006/2007; Yang and Hsu, 2011). We have ourselves been involved in three very different studies that may be usefully recounted and compared here with a retrospective look at their design, conduct, and insights, to encourage and aid others who might want to undertake similar work. The broader aim is to further cumulative research progress around organizing visions. As seen here, this entails: (1) accumulating and reconciling insights across separate studies; (2) building a shared methods experience and collective capability among researchers; and (3) articulating cumulative findings within the broader IT innovation research domain.

In the present paper, we focus in particular on our own case methods experience in studies of organizing visions, making some observations pertinent to furthering cumulative research progress. Below we summarize three case studies undertaken; we then identify and revisit a set of boundary choices made in their conduct, held to be particularly important to organizing vision studies. Consistent with the view that even rigorous case research designs need to be adaptive after entering the field (see, e.g. Eisenhardt, 1989), from our own experience, we make the broad point that these boundary choices are best regarded as open-ended and provisional, subject to being reconsidered over the course of the study, so as to maximize insights gained. We conclude by relating these identified boundary choices to three major challenges in making cumulative research progress from studies of organizing vision careers.

THREE CASE STUDIES

We briefly describe the case studies in the order they were undertaken. We take a wide view of what constitutes a case study, as we believe that different case situations allow for different, not always traditional, perspectives and methods, which deserve to be encouraged (see, e.g., Myers, 1997). In each of the studies described, we took a revelatory approach which seeks theory-based insights (Yin, 2003). Each study addresses the career path of a particular organizing vision, and two of the three focus on particular means of community discourse. We focus on the respective findings, leaving key particulars of the methods to the next section.

Launching Professional Services Automation (PSA)

In the case of PSA (Wang and Swanson, 2007), we had the opportunity to study how a new organizing vision gets launched, such that it comes to wide attention (or not). We theorized that institutional entrepreneuership (Garud and Kanoe, 2003) seeks to shape the institutional arrangements facilitating launching, providing for community mobilization and the technology's legitimation through discourse. From the study, we found that institutional entrepreneuers sought to mobilize the community by developing and recognizing leaders and facilitating members' focus on PSA. They further struggled to legitimate PSA by developing a coherent vision that incorporated success stories. As of the study's conclusion, it remained unclear whether the launch would be successful.

Sustaining Customer Relationship Management (CRM)

In the case of CRM (Wang and Swanson, 2008), we studied how media attention can be used to sustain the momentum of an organizing vision already successfully launched. We focused specifically on a series of special advertising sections on CRM published in *Business Week* over a five-year period. From the study, we found that the producers of these sections serialized them, incorporated models for action, and provided fresh meanings to the vision so as to accentuate CRM's progress and keep it worthy of continued attention. Broadly, we found that momentum can serve as its own resource, to be continually reinvested to keep discourse lively.

Capturing Web 2.0

In the case of Web 2.0 (Gorgeon and Swanson, 2011), we were interested to study how a specific discourse means, namely Wikipedia, might be employed in part to capture, that is, provide for a definitive interpretation, and thereby propagate an organizing vision. We studied the encyclopedic entry on Web 2.0 from its inception through five years of continual crowd-sourced revision. From the study, we found that the Wikipedia Web 2.0 entry went through stages of germination, growth, and maturation, closely reflecting the vision's career progress more broadly. The findings also further our understanding of Wikipedia as a new encyclopedic form, particularly well suited to engaging a community in the ongoing interpretation of emergent technology not yet established.

CASE BOUNDARY CHOICES

Reflecting on the three studies, we suggest that all and others of this type require that a particular set of boundary choices be made by the researcher. Our own experience suggests that these choices are best seen as open-ended over the course of the study. That is, while certain choices may be made at the outset of the study, these should be regarded as provisional, subject to being revisited as the study moves ahead. The choices involve: (i) time frames; (ii) cast of characters; (iii) action focus; (iv) observational means; (v) lines of interpretation; and (vi) contextual anchors.

Time Frames

The notion that an organizing vision has a career suggests that it will span some time period, which is not pre-determined, but rather a subject of the case study itself, which will essentially frame it. Each study will be associated with two related frames, that of the researcher's engagement in the study, and that of the case itself. The researcher's engagement will likely reflect opportunistic circumstances. One may come relatively early or late to a case and this is likely to be important to the study. Where one comes late, it may be necessary to construct a history, for instance. Similarly, one may conclude the study relatively early or late, given the unfolding circumstances, again with significant consequences. Whether a study is concluded prematurely or not may not be apparent at the time.

In the PSA study, we were fortunate to receive an invitation to participate in a conference organized to launch the vision, hence we were engaged relatively early on. We gathered data over a 15 month period, July 2001-September 2002, after which we began development of the case. Our data suggested a story that actually began in 1998, introducing a retrospective aspect. Our own telling of the story then went through several revisions over a few years. By the year of the study's publication, 2007, we had incorporated additional contextual data taking the story forward to this later date.

In the CRM study, we began it after taking notice of a special advertising section published in *Business Week* in April 2003. We quickly discovered that there had in fact been five earlier *BW* CRM ad sections commencing with the first one in July 2000. Our data collection focused on all these and subsequent sections and concluded with the publication of the ninth and last section in the CRM series in October 2004. Telling the story again took some time, over which it became apparent that the series was indeed concluded.

In the Web 2.0 study, we undertook it when the idea for it came to us in late 2007. From the data we obtained, we found that the first Wikipedia entry for Web 2.0 had been in February 2005 and that we therefore had a three-year history to work with. We presented our preliminary findings in workshops held in October and December 2008. But again, it took us some time to develop the case story, by which time we had two more years of data to work with, which proved very helpful, in confirming that the peak years of excitement over the Web 2.0 vision were over.

Cast of Characters

The nature of an organizing vision is such that it references a particular community presumed to promulgate it over its career. Accordingly, each case study will also be associated with a cast of characters, i.e. people and organizations, whose purposeful actions are the focus of the study. The researcher may engage this cast of characters directly or indirectly, in whole or in part. The researcher may also enter into the cast, e.g. through action research, or not. Certain members of the cast may also serve as sources for incorporating other members, with important consequences.

In the PSA study, we made important initial contacts through attendance at the First Conference and we soon recognized that in doing so we had quickly become part of the cast of characters. From our initial contacts, we found it relatively easy to identify other major players and we undertook interviews accordingly. Eventually we would share our PSA story with these same players.

In the CRM study, it was clear that we would need the cooperation of the key individuals involved in developing and producing the special *BW* CRM advertising sections and we worked carefully to obtain this. Sufficient doors were opened to us to allow us to complete the study. Our case story was then shared among our interviewees to allow them the opportunity to vet it for accuracy.

In the Web 2.0 study, the cast of characters was the largely anonymous contributors of some 5970 edits to the Wikipedia entry over five years. But we also investigated and reported on 16 individuals who had made more than 20 edits to learn more about them. We made no personal contact with these individuals, however.

Action Focus

Given that a particular community is theorized to promulgate an organizing vision over its career, we are interested in case studies to explore this agency. Whatever the cast of characters, each case study will inevitably tend to focus on only certain of the characters' actions. Other actions, some of which may be relevant and important, will go unobserved and unincorporated in the construction of the case.

In the PSA study, we identified a wide variety of actions that served to forge a supportive community, including a software vendor's contact of an industry analyst and the analyst's writing of a "white paper" that first defined PSA.

In the CRM study, we focused on key participant actions that led to and sustained the *BW* CRM special ad sections over a five year period. These included the recruitment of the producer of the special ad sections, as well as the writer of the editorial content, and the choice of topics for each section, aimed at keeping the ongoing CRM discussion lively.

In the Web 2.0 study, we focused narrowly on participant actions represented by edits of the Wikipedia Web 2.0 entry and the associated talk (discussion) page contributions over five years, seeking to understand the pattern of these edits and contributions. Actions outside this narrow sphere were not incorporated within our design.

Observational Means

Whatever the focus, the characters' actions will be perceived or not in part through the researcher's choice of observational means, direct or indirect, through interviews or participant observation, for instance, or through the examination of documentation, archival records, and physical artifacts, all of which serve case data collection (Yin, 2003). Given that organizing vision careers engage a diversity of players and forms of action, multiple and even novel observational means are likely to be called upon. Indeed, creativity in identifying and employing observational means may be important to the research. Still, not all possible means are likely to be used.

In the PSA study, we collected data by interviews, participant observation, and archival material made available to us. Our participation in a conference was pivotal to this process, as already mentioned.

In the CRM study, we collected data by interviews and the archived *BW* issues featuring CRM special ad sections. Here we were not participant observers, but were able to gain interviews with key players.

In the Web 2.0 study, we collected our data exclusively from the archives of Wikipedia. We did not seek to follow up and interview identifiable contributors. This was not a decision made at the outset, but rather toward the study's conclusion, when we came to consider it.

Lines of Interpretation

Once case data have been collected, the researcher must make sense of them, through what we shall call lines of interpretation, which tie the data together to tell a particular story. Typically, the line of interpretation is theoretical and to employ it is to ignore other lines or relegate them to the background. In the context of case studies motivated by organizing vision theory, the most likely line of interpretation is in effect pre-set, but other lines and complementary theory may also be drawn upon, indeed they may be very much needed, to tell the story. (We note too, that lines of interpretation may also be shaped by the underlying research epistemology, with significant consequences, as has been much discussed. See especially Myers, 1997.)

In the PSA study, we drew upon nascent theory of institutional entrepreneurship (Garud and Karnoe, 2003) to tell the story of how PSA came to be launched as an organizing vision.

In the CRM study, we drew from theory on technological momentum (Hughes, 1987) as well as that on institutional entrepreneurship to explain momentum acquisition and motivate the question of how momentum can be sustained.

In the Web 2.0 study, we motivated it through organizing vision theory, but also prior information science research on the nature of Wikipedia (e.g. Fallis, 2008).

Contextual Anchors

Whatever lines of interpretation are used, the story resulting from the case study is likely to require contextual anchors in order for it to be persuasive. Such anchors include known facts beyond the study's own data that serve to buttress the interpretation. Reaching out for such facts underscores the importance of context in studies of this kind (Avgerou, 2008), and also illustrates Yin's (2003) observation that in case studies "the boundaries between phenomenon and context are not clearly evident."

In the PSA study, we concluded from our data that PSA had not yet been successfully legitimated. We buttressed this claim with additional findings that PSA was little mentioned in the ABI/Inform database through January 2007. Too, subsequent events revealed that key participants had gone on to other endeavors. The attempted PSA launch appeared to be unsuccessful.

In the CRM study, from the trade literature, we obtained facts that supported the broad proposition that CRM's adoptive momentum was indeed sustained through the period of our study.

In the Web 2.0 study, we placed our Wikipedia findings in the broader context of Web 2.0's career path, through analyses of Google search trends for Web 2.0, mentions of the term in the published business literature, and actual user access of the Web 2.0 page in Wikipedia. We further identified a number of major events, such as conferences, associated with Web 2.0 more broadly and were able to associate these with peaks in the Wikipedia editing history.

DISCUSSION

In summary, we have identified and described a half dozen boundary choices that seem to be characteristic of case study research that seeks to illuminate the careers of organizing visions. The suggestion is that future research projects may wish to keep these choices specifically in mind, so that they are made more consciously than they otherwise would be, with thoughtful consideration of their ramifications. In our own three cases as described, we stumbled into some of these choices, though by happy circumstance, things worked out for us.

Apart from research on organizing visions, the boundary choices identified here may also have application to other, similar research that examines important innovation dynamics, in particular, adoption and diffusion processes (see Rogers, 1995). Case studies of such dynamics may be contemporary, as with those studies discussed here, or historical, purely after the events studied. Where the studies are contemporary, time framing involves obviously crucial choices, though as we have shown, these choices may themselves unfold, fall into place, and interact with the events themselves. The cast of characters is too subject to revision over the study, as certain actors may be written in or out. Notably, whether the cast includes the researchers themselves obligates the researchers to explain their role and how it may affect their findings. The focus on characters' actions may be rather broad or narrow, and is likely to be tied to the researchers' means of observation, as we have illustrated. Additionally, the researchers' lines of interpretation are necessary and important to the telling of the case story, in effect serving to thread events together to make sense of things, but should also be understood to represent boundary choices, as alternatives might have been considered (as reviewers of submitted publications will often suggest, not always helpfully). Finally, contextual anchors are particularly relevant to case studies spanning a particular time frame, for purposes of tying the story down to actual events and making it persuasive to its audience.

Beyond individual case studies, the boundary choices identified and discussed here have ramifications for making cumulative research progress, as discussed above. We consider three challenges to this progress, termed those of: (1) the extended and integrative time frame; (2) the inclusive and necessary cast of characters; (3) the convergent and persuasive interpretation. We discuss each challenge in turn.

Extrapolating from our earlier discussion, we first note that a collection of individual studies spans what might be termed an extended time frame. While this frame extends naturally forward, as new organizing visions emerge and are studied, it may also be extended backward through historical research that examines earlier visions not previously studied as such. The challenge, then, is whether this extended frame proves also to be integrative or not, in the sense that the broader unfolding organizing vision story is stable or at least coherent over the period spanned by the growing study collection. Do some of the emerging insights from individual studies prove themselves to be time-dependent, such that they wither away, for instance? Too, can the careers of multiple organizing visions be threaded together, such that the roots of some are identifiable in visions that went before them, as was the case of ERP and its development from MRP (Wang and Ramiller, 2009), thus enabling the broader IT innovation story to be constructed across visions?

Similarly, assembling an inclusive and necessary cast of characters across individual studies poses a challenge. Each study features its own cast, and certain actors who arguably play important roles in the larger story may find themselves overlooked or written out of the single script. This single-study problem is compounded in aggregating across studies, even as the larger cast is thereby assembled. Whether the growing collection of studies gives adequate voice to the many players necessary to advancing organizing vision careers over time is likely to remain an open question. Too, we note that the collective cast of characters is a changing one, as new technologies give rise to new means of participation, as illustrated by technology bloggers on the Web (Davidson and Vaast, 2009), who have more recently emerged to play an increasingly important role in both critiquing and advancing organizing vision careers.

The third challenge identified follows from the various lines of interpretation used among the individual studies. As discussed above, these lines may draw from different theories and perspectives to account for and gain insights into

organizing vision careers. Importantly, such different theories and their constructs may compete with, as well as complement, each other in attempts to forge an integrative interpretation across studies. Hence the challenge. Among the different theories and perspectives already in play in interpreting organizing visions are: institutional theory (Currie and Guah, 2007; Mignerat and Rivard, 2009; Tolbert and Zucker, 1996), social construction of technology (Hughes, 1987), organizational learning (Attewell, 1992; Robey, Boudreau, and Rose, 2000), institutional entrepreneuership (Garud and Karnoe, 2003), management fashion (Abrahamson and Fairchild, 1999; Baskerville and Myers, 2009; Wang, 2010), discourse theory (Heracleous and Barrett, 2001; Phillips, Lawrence, and Hardy, 2004), and economic sociology (Callon, 2007; Pollock and Williams, 2010). Indeed, it seems to be characteristic of IT innovation research in the aggregate that it draws from an especially rich set of theoretical foundations and related constructions. While we consider this more a blessing than a curse, in pursuit of an integrative and persuasive interpretation of organizing visions, skeptics may of course see it the other way around.

In sum, challenges to making cumulative research progress arise in substantial part from the boundary choices made over time by researchers in individual case studies not necessarily conceived to fit with one another. They arise too whether these choices are made consciously or not. We then face these challenges necessarily, every time we motivate our own study from what we claim has been learned or not by other related prior studies. We face them too, whenever we undertake the writing of a review paper that aims to integrate and reconcile findings across studies. In these situations too, we suggest that attention to boundary choices and their ramifications offers the best prospects for making cumulative research progress. Our own reading of the boundary choices made by others, not just ourselves, is thus crucial to the collective effort. Of course, we are aided in these readings when authors communicate their more important boundary choices explicitly in their manuscripts.

In conclusion, in reflecting on case boundary choices here, we have sought to identify and bring several of them to light, to serve future research that further illuminates the careers of organizing visions, in particular. Notwithstanding the challenges posed, we are optimistic that cumulative progress can be made from further case studies of the kinds documented here. From our discussion, we hope it is clear that our interest is not to inject greater rigor into the research process, but rather greater awareness of the choices that will necessarily be made in studies such as those described. Openness to these choices over the course of the research, more than closure, is the recommended posture, a natural complement to the basic motivation and exploratory purposes of the studies. At the same time, careful attention to the choices made by others in our readings of already published studies can contribute to tying our cumulative work more effectively together.

Lastly, from our own experience, we should highlight the virtues of undertaking multiple case studies driven by a single overarching theory, such as that of organizing visions. The importance of a multiple case study approach has recently been highlighted by Williams and Pollock (2012), who argue for assembling a "biography" of an innovation over its lifetime. As illustrated here, each study in a related set can inform the others, to the advantage of all. In particular, where organizing visions are concerned, there appears to be no shortage of opportunities to do useful complementary studies of different kinds. Again, a posture of openness toward such opportunities, more than a fixation on a particular kind of study, may be the most fruitful in generating the insights sought.

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