Creativity and the Arts of Disguise: Switching Between Formal and Informal Channels in the Evolution of Creative Projects[1][2]

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Abstract
The extant creativity literature suggests that creative projects evolve in organizations through either formal or informal channels. This article advances creativity research beyond these two limited single-channel conceptualizations by exploring why and how creative projects evolve by accessing both formal and informal channels. In a study of a creative communications campaign in a subsidiary of a Fortune 500 multinational corporation, we find that switching from the formal to the informal channel allows the creative project to bypass organizational barriers and secure strategic autonomy, while switching from the informal to the formal channel allows the creative project to preserve its legitimacy and secure resources. Our analysis reveals that these bidirectional channel-switching transitions are propelled by four versatile subprocesses: selective concealment; strategic use of time; exploitation of hierarchical and knowledge gaps; and shared wins framing. Drawing on our findings, we develop a dual-channel process model of creative evolution which provides a missing theoretical link between, on the one hand, the variable conditions that impel creative projects to follow at times formal and at other times informal channels; and on the other hand, the differential mechanisms through which the two directions of channel switching allow creative projects to further evolve.

Introduction

Drazin, Glynn, and Kajanzian (1999) observed that the context in which most creativity occurs in organizations is not that of an isolated individual or a small group unit, but that of an interdependent, complex, and long-duration project. Today, an increasing proportion of creative work is accomplished through complex projects that bring together various professionals across geographical, temporal, organizational, team, or/and functional boundaries (Fisher, Pillemer, & Amabile, 2018; Harvey, 2014). Creative projects are emergent trajectories of interdependent actions that are initiated and orchestrated by multiple actors in order to introduce into a social context some form of novelty that significantly departs from preexisting patterns of action (Obstfled, 2012). In comparison to more routine types of projects, creative projects involve tasks that are heuristic rather than algorithmic (Amabile, 1988), and encounter higher degrees of situational ambiguity about outcomes, work processes, and professional relationships (Drazin et al., 1999; Lingo & O'Mahony, 2010; Obstfeld, 2012). In simpler terms, a key distinguishing feature of creative projects is the deliberate pursuit of novel ends through novel means. As Obstfeld (2012: 1573) put it, "creative projects are conducted de novo, 'as if for the first time'."

In their attempt to reach novel ends through novel means, creative projects may transgress the normative boundaries that regulate the production of novelty in the organization. Creative projects may evolve not only according to formal organizational procedures (Ben-Menahem et al., 2016; Hargadon & Bechky, 2006; Sutton & Hargadon, 1996), but also by violating formal organizational approval processes (Criscuolo et al., 2014; Globocnik & Salomo, 2015; Lin, Mainemelis, & Kark, 2016). The extant literature suggests hence that creative projects may unfold through either formal (or official) or informal (or unofficial) channels (Augsdörfer, 2005). Both formal and informal channels allow creative projects to pursue a legitimate organizational goal, creativity. However, while formal channels allow creative projects to pursue creative ends through legitimate means, informal channels allow creative projects to pursue creative ends through illegitimate means (Mainemelis, 2010; Merton, 1968).

Creative projects that evolve through *formal channels* involve in-role employee behaviors and formal managerial approval. Employees work legitimately and visibly in such projects according to creative requirements that are internal to their jobs (Hargadon & Bechky, 2006; Unsworth, Wall, & Carter, 2005); or/and according to managerial instructions or/and other forms of encouragement to be

creative (Amabile & Pratt, 2016; Shalley & Lemoine, 2018; Sutton & Hargadon, 1996). The 'owner' of creative projects in such cases is the larger organization that formally sponsors, implements, and evaluates their unfolding progress (Benner & Tushman, 2003; Mumford et al., 2018; Staw, 1990). In contrast, creative projects that evolve through *informal channels* do not constitute formal organizational projects and do not formally possess organizational schedules, spaces, budgets, or other resources. Rather, they pursue novel ends through novel but illegitimate means. In such cases, employees "apply unorthodox approaches, ignoring formal structures to further elaborate their ideas' potential and promote their implementation. They work without formal legitimacy and gather their own resources until sufficient clarity allows for informed decisions" (Globocnik & Salomo, 2015: 505). These informal creative projects evolve under the guidance of individuals who engage in counter-role behaviors that are not prescribed, anticipated, or even seen as desirable by management (Staw & Boettger, 1990). To date, two forms of counter-role behaviors have been linked to creative projects.

The first is bootlegging (King, 1967), "the process by which individuals take the initiative to work on ideas that have no formal organizational support and are often hidden from the sight of senior management, but are undertaken with the aim of producing innovations that will benefit the company" (Criscuolo et al., 2014: 1288). The second is creative deviance, "the violation of a managerial order to stop working on a new idea" (Mainemelis, 2010: 560). The main difference between bootlegging and creative deviance is that the latter violates a formal negative evaluation decision (e.g., an order to stop working on a creative project), while the former bypasses the formal evaluation process (e.g., it does not request managerial permission to pursue a creative project when such permission is required). Creative deviance is a narrower construct (Lin et al., 2016: 539) and it can be seen as an extreme form of bootlegging (Criscuolo, 2014: 1290). Bootlegging is usually hidden (Augsdörfer, 2005, 2012), while creative deviance may be either hidden or visible (Mainemelis, 2010). Both concepts are not ex ante positive or negative. Rather, they can be best described as inherently ambiguous, as they may or may not result in useful outcomes for individuals and organizations (Criscuolo et al, 2014; Lin et al, 2016).

To date, a nascent stream of research has examined the antecedent conditions that facilitate bootlegging (e.g., Augsdörfer, 2012; Globocnic, 2019; Globocnic & Salomo, 2015) and creative deviance (e.g., Petrou et al., 2020; Petrou, Van Der Linden, & Salcescu, 2018; Tenzer & Yang, 2020),

and the mechanisms through which bootlegging and creative deviance result, in turn, in creative products (e.g., Augsdörfer, 2005; Criscuolo et al., 2014; Lin et al., 2016). An older and larger research stream has studied creative project evolution through formal channels (for reviews see Amabile & Pratt, 2016; Anderson, Potočnik, & Zhou, 2014; and Mumford et al, 2018). However, while past research has studied how creative projects unfold through *either* formal or informal channels, it has rarely examined how creative projects unfold through *both* formal and informal channels. Consider that 3M's Post-It Notes (Pinchot, 1985), Hewlett Packard's large electrostatic displays (Nemeth, 1997), Nichia's LED lighting technology (Johnstone, 2007), and Paramount's film The Godfather (Mainemelis & Epitropaki, 2013) are among the creative products that have emerged from creative projects that evolved over time by combining and switching between formal and informal channels. The extant literature, however, offers little theoretical insight about how, when, under which conditions, and with what consequences creative projects evolve by accessing at times formal and at other times informal channels.

In this paper we explore the question, *how do creative projects evolve by switching between formal and informal channels?* Using data from a real-time study of a creative communications campaign in a Fortune 500 multinational corporation, we were able to observe multiple incidents of channel switching throughout the duration of the creative project; to identify the subprocesses that propel channel switching; and to observe its dynamic effects on the evolution of the creative campaign. Our work contributes to the organizational creativity literature a set of nuanced insights about the elements of channel switching and an emergent theory of the overall process of dual-channel evolution.

Theoretical Background

Structural Strain as an Antecedent of Creative Evolution in Formal and Informal Channels

Structural strain theory (Merton, 1968) suggests that the emergence of conforming and nonconforming behaviors is related to degree of disjunction between a social system's prescribed goals and the formal means available to individuals for pursuing these goals. Insofar as individuals internalize an organization's prescribed goals, and also insofar as they have access to legitimate means to achieve these goals, they can pursue legitimate goals in legitimate ways. Conversely, when individuals internalize an organization's prescribed goals but lack access to legitimate means to achieve them, they

may pursue legitimate goals in illegitimate ways. Drawing on structural strain theory, theories of creative deviance (Mainemelis, 2010) and bootlegging (Criscuolo et al., 2014) posit that when creative projects attempt to achieve a creative outcome but lack access to formal means to pursue it, they may attempt to pursue it through informal channels. Empirical research has shown that structural strain is a major antecedent of informal channel evolution: While a low degree of structural strain promotes evolution in the formal channel, a high degree of structural strain promotes evolution in the informal channel (Globocnic & Salomo, 2015; Petrou et al., 2018; Tenzer & Yang, 2020). Past research has not examined, however, how partial and variable levels of structural strain (ie. the degree of disjunction between formal goals and formal means) influence the evolution of creative projects. This is important because, at any given point in time, creative projects may have some but not full access to formal means; may secure some but not other resources; and may secure formal authorization at some but not at other times. Throughout our study, therefore, we paid close attention to how variable and fluctuating levels of structural strain influence the evolution of the creative project and the channel switching process.

The Channel Switching Process

Organizational theories of bootlegging and creative deviance acknowledge, albeit indirectly, that creative projects that evolve in informal channels also access at some point formal channels. Prior to resorting to the informal channel, creative deviance by definition starts in the formal channel when employees request managerial permission to initiate a creative project (Mainemelis, 2010). In addition, at some point in time, both bootlegging and creative deviance have to ultimately regress from the informal channel back to the formal channel if their outcomes are to become accepted as legitimate organizational products (Augsdörfer 2005; Mainemelis, 2010). However, although past research has acknowledged the occurrence of channel switching in the evolution of creative projects, it has rarely formulated theoretical insights about it. In order to address this knowledge gap, throughout our study we explored whether channel switching consists of a single or several incidents across the duration of the project; and whether it occurs in some or across all stages of the creative process (ie. preparation, idea generation, idea elaboration, idea championing, and idea implementation; Csikszentmihalyi, 1997; Mainemelis, 2010; Perry-Smith & Mannucci, 2017). Moreover, given that channel switching involves

two directions, from the formal to the informal channel and vice versa, we also explored throughout our study whether these two directions of channel switching involve the same or different elements.

Differential Effects of Channel Switching on the Evolution of Creative Projects

Past research has found that formal and informal channels exert differential effects on the evolution of creative projects. The advantages of the formal channel entail project legitimacy; access to resources, such as time, budgets, infrastructures, and materials; and access to feedback (Amabile et al., 1996; Amabile & Pratt, 2016; Anderson et al., 2014; George, 2007). Conversely, the advantages of the informal channel include strategic autonomy; bypassing bureaucratic and political barriers; avoidance of close monitoring by managers; and avoidance of premature idea evaluation by the organization (Augsdörfer, 2005; Criscuolo et al., 1994; Globocnic & Salomo, 2015; Mainemelis, 2010). Research has also shown that in many occasions it might be too risky for individuals to follow only an informal channel of creative project evolution. Parker (1997: 197) noted that when individuals have low uncertainty about the goals but high uncertainty about the means, engaging in bootlegging has the plus of "enthusiasm" and the risk that the bootlegging effort may "detract from already planned activity." Dutton et al. (2001) found that not using formal processes and formal communication channels usually leads to failure in issue selling. Lin et al. (2016) found that creative deviance decreases followers' creative performance when their leader is manipulative. Shukla and Kark (2020) noted that while organic structures may foster the positive effects of creative deviance, mechanistic structures usually strengthen its negative effects. Criscuolo et al. (2014: 1288) found that in contexts characterized by high degrees of formalization, individuals who engage in bootlegging "may alienate themselves from the organization, with the risk that their creative efforts will be misaligned with corporate objectives."

However, research has rarely examined, to date, whether and how, by using both formal and informal channels, creative projects can extract both sets of benefits, while minimizing at the same time the risks associated with the informal channel. Throughout our study, therefore, we also paid close attention to whether and how the two directions of channel switching (from formal to informal channels and vice versa) activate differential mechanisms that allow the creative project to further evolve.

Method

Case Selection and Overview

We employed a single-case inductive design in order to trace the temporal unfolding of a complex process and to elicit the perspectives of the key actors involved (Eisenhardt, 1989; Yin, 2003). Incidents of bootlegging and creative deviance in large organizations are difficult to capture because they usually take place secretly and without formal documentation (Criscuolo et al., 2014). The single-case design, due to the granted access that we gained, enabled us to collect confidential information in real time and in-situ that in other circumstances we would not be likely to obtain (Eisenhardt & Graebner, 2007).

We collected data from Lusso[5], a Fortune 500 multinational confectionery corporation. Lusso's Global Board was based at the HQ and included Functional Chief Officers and Regional Senior Vice Presidents (SVPs). The Chief Marketing Officer and her team (VP Communications, Global Category Manager, and International Project Manager) managed the development of global product innovations and global communications campaigns. We refer to this team as the Global Category Center (GCC). Each subsidiary was managed by a General Manager (SGM) and had a local Board of Directors and a number of Brand Managers. The SGMs and the local Board of Directors reported directly to the SVP of their respective regions and were fully responsible for local operations, profits, and losses.

Bureaucratic structures are known to constrain local autonomy, a fact that triggers counter-role behaviors (Criscuolo et al. 2014). Lusso had a centralized and standardized product and communication development approach that comprised global brand norms and global process norms. The GCC at the HQ was responsible for developing new global products and global communication campaigns, while the subsidiaries managed only the roll out of the new products and the implementation of campaigns. The global norms underlined the need for a premium image for the products portfolio, and the global process norms specified that every local adaptation should incorporate only the minimum necessary changes in order not to dilute the global brand values. The HQ team communicated systematically with the subsidiaries to ensure that local actions were fully aligned with the Category's global brand norms.

Our study focused on a creative project in one of Lusso's subsidiaries, Subsidiary X. While

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[5] Names of the organization, subsidiaries, products, and individuals are pseudonyms.

conducting another study at Subsidiary X, we observed that its General Manager (SGM) was planning to develop a new local communication campaign for Lusso's new chocolate bar product, ChocoSilk. At the time the GCC at Lusso's HQ had already produced a TV commercial for ChocoSilk and made it available to all subsidiaries worldwide. We reasoned that the development of a local campaign by Subsidiary X might lead to violations of Lusso's global brand norms and global process norms. Given that this was an exceptional and rare situation within the organization (Rouse & Pratt, 2021; Siggelkow, 2007), we focused and contextualized our research question in terms of how the new local campaign was going to unfold through formal and informal channels. The local ChocoSilk campaign eventually resulted in financial and market outcomes that were hailed as successful by Lusso's HQ, and received a prestigious creative communications award for its novel and disruptive character in Subsidiary X's country. This is an indication of the campaign's creativity (ie. its usefulness and novelty) as perceived by its field (Amabile, 1988; Amabile & Pratt, 2016). During the course of our study, however, we could not possibly know that the campaign was going to result in such positive outcomes. We were thus able to examine the dynamic unfolding of a creative project in real time and without any retrospective bias.

Data

Because actors may hide or underreport secret activity on informal projects, observational methods are more beneficial in providing a detailed picture of 'underground' creative efforts (Criscuolo et al., 2014). Observational studies often focus only on the main actors and the key events of the focal phenomenon (Bolander & Sandberg, 2013; Ravasi & Turati, 2005). Our initial data collection involved observations of fourteen meetings that the two Subsidiary X key actors, SGM George and Marketing Director (SMD) Kate, organized to orchestrate the development, implementation, and follow up of the creative project. During these observations, summarized in Table 1, the second named author recorded reflective notes and took 170 photos that served as the foundation of the field notes (Emerson, Fretz, & Shaw, 1995). Her roles in these meetings iterated from non-participant to participant observer, as she was viewed by the two key actors as a valuable source of academic advice on creative communications. These fourteen meetings, which often lasted several hours, allowed us to elicit in a temporally sensitive and realistic manner the complexities and hidden agendas involved in the case (Miles & Huberman, 1994).

The second named author also conducted semi-structured interviews with the two key actors, the SGM and the SMD. We then used purposeful sampling to seek out additional informants (Glaser & Strauss, 1967) and we interviewed six more actors in Subsidiary X and the advertising agency that it collaborated with to develop the campaign. The interviews lasted between 15 and 120 minutes. Some interviews were short as many of the respondents were involved toward the end of the project and did not add new insights. Direction for subsequent interviews emerged from the analyses of existing data. We (the two authors) held frequent meetings to compare systematically data across interviewees, while at the same time allowing the emerging analysis to benefit from our interpretations and discussions (Charmaz, 2006). As we started to develop provisional models of the data, we employed theoretical sampling to seek out incidents that could fill in remaining gaps and refine our initial ideas (Dey, 2007). A second round of interviews was conducted with Subsidiary X's SGM and SMD, and the advertising agency's CEO. All interviews were transcribed. Field notes and transcriptions were examined by the two authors and were followed by personal contact or by telephone to collect additional information. In total, we conducted eleven interviews with eight key informants, as shown in Table 2.

Moreover, we collected internal documents that captured the outcomes of meetings among the SGM, the SMD, and the executives of the research and advertising agencies that were commissioned to work on the development of the campaign. We also collected emails that were exchanged among the SGM, the SMD, and executives at Lusso's HQ. In addition, we collected press releases and all creative campaign materials produced throughout the creative project, including TV and radio commercials, posters, and digital communication. The documentation materials, which we summarize in Table 3, provided us with tangible, politically sensitive, and high-quality data (e.g., confidential emails, research reports, campaign materials) that allowed us to triangulate our observation and interview data.

---Insert Tables 1, 2, and 3 about here---

Analysis

We employed a grounded theory approach (Charmaz, 2006; Glaser & Strauss, 1967) that entailed eleven steps. First, we created a storyline and timeline of events in order to make sense of the data (Fournier & Mick, 1999). In Figure 1 we depict 15 main events across the 10-month course of the creative project,

from SGM's decision to initiate a new local campaign (E1 in month 1) to the final presentation of the campaign's outcomes to HQ (E15 in month 10). Second, in order to get a sense of the linear progress of the creative process across the 10-month period, we classified the 15 main events into four phases: preparation, idea generation, idea elaboration and championing, and idea implementation, as shown in Figure 1. Although idea elaboration and idea championing are distinct phases in conceptual terms (Perry-Smith & Mannucci, 2017), we could not separate them in temporal terms because during month 5 there was a great deal of back-and-forth movement between idea elaboration and idea championing. This is in line with the extant literature which suggests that the creative process is not only linear but also recursive (Csikszentmihalyi, 1997; Mainemelis, 2010; Perry-Smith & Mannucci, 2017).

Third, to operationalize the constructs of formal and informal channels, we classified the 15 main events into two groups: events that at the time of their occurrence were formally known by HQ (E2, E8, E11, E13, and E15); and events that at the time of their occurrence constituted informal local actions that were hidden from HQ (E1, E3, E4, E5, E6, E7, E9, E10, E12, and E14). The resulting red line shown in Figure 1 delineates two channels through which the creative project evolved. The upper-hand part illustrates the formal channel, while the lower-hand part illustrates the informal channel.

Fourth, we identified nine incidents of channel switching in the creative project. The blue dotted line shown in Figure 1 illustrates the evolutionary trajectory of the project, which switched course between the formal and the informal channels nine times during its 10-month duration. Each channel switching transition (e.g., S3) was preceded by a main event in the formal channel (e.g., E7) and was followed by a subsequent main event in the informal channel (e.g., E8), or vice versa.

---Insert Figure 1 about here ---

Fifth, we used open coding to code the observation and documentation data (Strauss & Corbin, 1998). We selected as unit of coding the incident of channel switching, and we coded all switching incidents that we identified in our study (S1 to S9). This provided us with a sufficient number of incidents (n=9) to make multiple comparisons about the channel switching process throughout the duration of the project. Six, during the first-order coding process, the first named author engaged with the second named author in an ongoing process of 'interviewing the investigator' to test the robustness of the coding scheme (Chenail, 2011). This allowed us to identify discrepancies between the incidents

of appearance of the first-order codes and the timing of events, a fact that led us to further explore and triangulate our data. Seven, following the addition of the interview data, we performed additional iterations among data collection, data analysis, and discussion, a fact that led us to developed new first-order categories. Eighth, we used second order (axial) coding to distill the first-order codes into higher-order categories (Gioia, Corley, & Hamilton, 2012; Strauss & Corbin, 1998). We compared the emergent categories across the nine incidents and with the relevant literatures in multiple iterations, and then we subjected our findings to new analysis in search for new second-order themes that either supported or contrasted our findings. We eventually settled in four aggregate dimensions of channel switching subprocesses: *selective concealment, strategic use of time, exploitation of hierarchical and knowledge gaps,* and *shared wins framing*. We then proceeded to building a data structure (Gioia et al., 2012). The final data structure is presented in Figure 2 and illustrated evidence are shown in Table 4.

---Insert Figure 2 and Tables 4 and 5 about here ---

Ninth, we used memo writing during our discussions and cycled on the data to link codes in various ways, making continuous refinements in the course of the analysis. This analysis revealed that the four subprocesses varied in terms of the patterns of interrelationship between their constitutive elements; the time period of the creative project in which they appeared; their behavioral targets; the direction of the channel switching incidents in which they were implicated; and the patterns of combination that they formed with the other subprocesses. Given these layers of complexity, we paid careful attention to identifying the various patterns of configuration among the four aggregate themes.

Tenth, to connect in a rigorous manner our coded data about the four channel switching subprocesses to our observations about the preceding and subsequent events through the duration of the creative project, we performed an integrative incident-by-incident analysis, which we summarize in Table 5. This analysis allowed us to craft several versions of the grounded process model that we present later in the paper. While our unit of coding was the incident of channel switching, our level of analysis, and later our level of theorizing, was the creative project. Finally, to enhance credibility, we tested our interpretations by reviewing all of the data again, searching for confirming and disconfirming evidence (Miles & Huberman, 1994). Feedback on our analyses and conclusions from peer researchers and two key informants at Subsidiary X helped us refine our tentative interpretations (Sonenshein, 2014).

Findings

The chronological examination of our data revealed that there were nine incidents of channel switching during the evolution of the creative campaign. As shown in Figure 1, channel switching occurred across all phases of the creative project; was bidirectional; and involved four incidents of switching from the formal to the informal channel (S2, S4, S6, S8), and five incidents of switching from the informal to the formal channel (S1, S3, S5, S7, S9). We found that, regardless of its direction, channel switching entailed one or more of four subprocesses: selective concealment; strategic use of time; exploitation of hierarchical and knowledge gaps; and shared wins framing. As shown in Table 5, a channel switching incident could involve one (S4, S8), two (S5, S6, S7, S9), or three subprocesses (S1, S2, S3).

Selective concealment involved the intentional communication of some actions and the intentional hiding of other actions. Throughout the project, George and Kate used in unison these two tactics in their interactions with executives in Lusso's HQ, in Subsidiary X, and in the advertising agency. Selective concealment was implicated in six channel switching incidents in our study. *Strategic use of time* involved the use of time pressure or/and time urgency in order to secure decisions that could push the project to the next step, especially in the preparation and idea generation phases; and the use of temporal delays, especially in the idea implementation phase, in order to formally communicate project outcomes only after a sufficient number of positive outcomes were generated. Strategic use of time was implicated in six channel switching incidents. *Exploitation of hierarchical and knowledge gaps* was used opportunistically to secure favorable decisions for the creative project from decision makers who at the time were new to their roles, occupied their roles on an interim basis, or/and otherwise lacked deep expertise. This subprocess was implicated in four channel switching incidents in our study. Last but not least, *shared wins framing* was used by George and Kate to frame ex-post Subsidiary X's local creative campaign as a global company-level success. This subprocess involved methodically gathering evidence of the campaign's positive results and then communicating them as collective wins. Shared wins framing was implicated in three channel switching incidents during the idea implementation stage.

We did not observe any disagreement about the goals that the HQ expected Subsidiary X to achieve by launching ChocoSilk. Subsidiary X wanted to reach the same goals, but its SGM (George) and SMD

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(Kate) believed that, due to the peculiarities of the local market, these goals could not be achieved by following Lusso's global brand norms and global process norms. This situation represented, therefore, a typical case of structural strain, whereby the lack of access to formal means triggered the search for novel informal means in an attempt to achieve the organization's formal goals. An equally important observation is that George and Kate abstained from publicly questioning Lusso's global norms and from engaging in any form of confrontational behavior towards the HQ. The objective of the creative project that we studied hence was to bypass rather than to challenge or change the company's global norms.

Finally, by juxtaposing our incident-by-incident integrative analysis, shown in Table 5, with our chronological analysis of the main events, shown in Figure 1, we reached the conclusion that, while switching from the formal to the informal channel allowed the creative project to bypass organizational barriers and secure strategic autonomy, switching from the informal to the formal channel allowed the creative project to preserve its legitimacy within the larger Lusso organization throughout its evolution and to secure key resources on two separate occasions. Below we illustrate in greater detail our findings about the nine channel switching incidents that marked the evolution of the ChocoSilk campaign.

Switching from the Informal to the Formal Channel to Secure a Legitimate Kick-Off (S1)

Because Subsidiary X lagged far behind its competitors, HQ exerted pressure on it to increase its market performance through the launch of ChocoSilk. George (I1) felt, however, that the ChocoSilk campaign that was developed by HQ was not appropriate for the local market. Consumer and market research had shown that the Lusso brand lacked novelty in the local market (D4), and that the same elements were discernible in all communication campaigns of Lusso and its competitors (D2, D4, D5, D6). For example, the campaign of Lusso's main competitor showed a well-known, highly refined and stylish male character advocating the product benefits on camera (D2). Another competitor's communication campaign featured a cultured male persona who enjoyed the product while he was leading an exquisite lifestyle (D2). According to Kate (I2),

> The [Lusso GCC] guidelines suggested that there should be shots of enjoyments in the TV commercials that were typical for all communication of the chocolate bars category. Moreover, all creative material should convey an image of luxury and elegance that was appropriate for our brand.

George and Kate believed that the incorporation of Lusso's global brand norms in ChocoSilk's global communication campaign resulted in campaign material that did not entail novel elements (O1). At the time (E1) the GCC at Lusso's HQ had produced a TV commercial for ChocoSilk and made it available to all subsidiaries worldwide. The TV commercial promoted an image of upscale refinement and elegance (D3). Kate (I2) believed that HQ's TV commercial was highly unlikely to help Subsidiary X differentiate ChocoSilk from the more established products of its main local competitors:

> The Center would suggest that I should use the global communication that was aired in the UK. In that case, I would be 'lost' for sure! That was a wrong communication for the new chocolate bar launch in our market. If we used the [global brand] norms of the Center, we could very easily lose this unique proposition and give time to the competition to respond.

Convinced that ChocoSilk could help Subsidiary X reach its goals, George decided to initiate a new local communication campaign (E1). Because Lusso's global process norms did not allow the local development of new communication campaigns, and because the rationale behind the local campaign was to deviate from the global brand norms, George (I1) did not perceive any chance of securing HQ's permission for the creative project. At the same time, he did not want the project to be completely illegitimate. Moreover, given the limited resources available in Subsidiary X, he had no other practical option but to formally request from HQ resources in order to finance the project. Therefore, the lack of alternative informal means to the formal means controlled by HQ propelled the first switching transition (S1), where the idea for the local creative project became formally known to HQ, as shown in Figure 1.

George and Kate used selective concealment to formally request permission and resources from HQ to launch the new product in their local market, while concealing from HQ the scope and content of the local communication campaign. George (I1) presented the annual plans of Subsidiary X to HQ asking for oral approval to launch the ChocoSilk campaign locally without disclosing that he was not planning to use the TV commercial prepared by HQ. In her discussions with the GCC about the financial resources needed for the new product launch, Kate avoided making any specific reference to the need for developing a new communication. Kate (I2) also took advantage of the fact that executives at the HQ took for granted that new communications at Lusso could be designed only at HQ and not locally:

> The Center never talked about communication. So I took advantage of that. I knew that if I asked them for permission [for a new local communication] they would suggest

that I should use the international communication that had already been aired in another country.

The selective concealment of actions was reinforced by a second subprocess, the exploitation of hierarchical and knowledge gaps. At the time a series of new appointments at the HQ had left senior roles and responsibilities temporarily unclear, a fact that enabled George and Kate to effectively conceal selected actions. Because the Chief Marketing Officer and the Global Category Manager had extensive global responsibilities and were new to their roles, as soon as they assumed their duties they focused their attention on other subsidiaries that were facing at the time more complex business issues:

> At that time the new Chief Marketing Office had just took over. That is why she was busy with other countries and she was not paying attention to us. (Kate, I2)

Being new to their roles, senior executives at HQ lacked the depth of knowledge or/and experience required in order to discern what was concealed behind the requests submitted by George and Kate. For example, Kate (I2) communicated directly with the Global Category Manager who "*had just been promoted and she did not know what to ask for from the subsidiaries*." Selective concealment and the exploitation of hierarchical and knowledge gaps were further reinforced by a third subprocess, strategic use of time. Lusso's marketing executives believed that speed to market was key for a product innovation to outpace competition, but they were also aware that the bureaucratic processes required by HQ to adapt the product specifications and the communication material to local markets increased significantly the length of time-to-market. Kate (I2) pointed out that during the global meetings that took place at the time between the Global Category Manager and the SMDs there was ambiguity regarding future global product launches. Being new to their roles, the CMO, the Global Category Manager, and other HQ executives were looking for 'quick wins' among subsidiaries that would serve as evidence of their own successful performance in their newly acquired positions. Taking advantage of the situation, George (I1) gave to Kate the authority to negotiate openly with the HQ executives the fast-track launch of the new product, ChocoSilk, in Subsidiary X's local market. Kate (I2) explained:

> At that time, the Center was in a dead end because nothing could be feasible in fast track [ie. less than 6 months]. So I went to the Global Category Manager and I proposed that Subsidiary X launches the new product as a pilot country--quick and fast; that would be a quick win for Subsidiary X.

The strategic use of time, in this case the use of time pressure and time urgency, in conjunction with selective concealment and the exploitation of hierarchical and knowledge gaps, resulted in HQ's decision to formally authorize the fast-track launch of ChocoSilk in Subsidiary X's market. A few days later, Kate (I2) asked from HQ additional financial resources to support the launch of the new product:

> In the break of an international meeting, I approached the Global Category Manager and I said to her: "I need some budget money to launch the new product in the market; not a lot for you but good enough for me." She was positive. So when the meeting begun again I requested formally the investment in front of everybody and I got it.

As shown in Figure 1 and Table 5, the first switching transition (S1) resulted in the HQ formally granting permission and resources to the creative project (E2), albeit without knowing that the creative project was going to involve the development of a brand new local communication campaign.

Returning to the Informal Channel to Develop a Provocative Creative Proposal (S2)

As soon as the HQ provided authorization and resources for the launch of ChocoSilk in the local market (E2), George and Kate switched the course of the creative project back to the informal channel (S2). This channel switching incident triggered the idea generation phase, which lasted about three months, as shown in Figure 1. The first step involved commissioning a research agency. The HQ had previously funded a market research program by an international research agency on the ChocoSilk product, which included Subsidiary X's local market (D4). This research allowed the HQ to gain a better understanding of the specificities of local markets, but it did not provide Subsidiary X with detailed insights about local communication trends and tactics. To acquire such insights, Kate (I2) commissioned a local business research agency to conduct two research studies. These studies suggested that the time was ripe for Lusso's new product to differentiate itself from competing products in the local market:

> Customers of the local market are experienced product users, they appreciate good quality, and they are open to variety and new alternatives. (Focus groups report, D5)

> They worry a lot; they are disappointed by their future prospects. Regarding brands, they are ready to experiment. (Ethnographic research report, D6)

Using again selective concealment, and further exploiting hierarchical and knowledge gaps, Kate communicated to the International Manager (IMM) the research insights related to local consumer preferences and habits, but she concealed all research findings about the tactics and trends related to

communication (O1, D5, D6). Being newly appointed to his role, the IMM received dispersed fragments of the two research reports without ever requesting from Kate the complete research reports.

Next, George and Kate commissioned an advertising agency to work on the development of the new campaign. They used selective concealment and strategic use of time to keep the development of the new campaign hidden from the HQ. For the next 100 days (the period between S2 and S3 in Figure 1) they communicated with HQ mainly about other issues. As George (I1) put it, "*We followed the necessary minimum.*" Moreover, while they informed other executives at the local office about the fast-track launch of ChocoSilk, they concealed from them the development of the new communication campaign. According to Thomas (I5), Subsidiary X's Human Resources Director,

> We did not know anything about the development of the campaign. Kate presented it to the Board of Directors just a few days before the campaign went on air nationally.

To further minimize the probability that HQ might learn something about the campaign, George and Kate used time pressure strategically and asked the advertising agency to complete its work in a tight deadline. According to Joseph (I6), the advertising agency's CEO, "*Time was a key consideration in this project. We had to move quickly from the moment we received the oral brief until the on-air scheduled timing*." George and Kate also abstained from producing written documents that could reveal the project to HQ. Alice, the advertising agency's Account Director (I7), stated that while clients usually submit a written brief, "*George and Kate gave the brief. Nothing written… everything was oral.*" Moreover, George and Kate concealed from the advertising agency Lusso's global brand norms and the TV commercial produced by HQ. Joseph (I6) told us, "*I was not aware of the global norms.*" When George and Kate first met with the advertising agency, they shared only the insights of the two research studies, and they stressed the need for a novel and provocative communication campaign for ChocoSilk:

> We wanted to have a very strong start by bringing something "fresh" in the market, because we had to target the Nº 1 competitor and win. (George, I1)

> I wanted a strategy to enable me 'to break the wall' of the 90% share that the competition was holding at that time. (Kate, I2)

George and Kate reached an agreement with the advertising agency about the creative objective of the communication campaign (E3). Karin (I8), the advertising agency's Creative Director, recalled:

And I think in this pre-meeting [with George and Kate] we felt that an innovation had to burst. We had to show that a challenger was in the market that would break the monopoly. In the second meeting we concluded the creative idea.

Taken together, selective concealment, exploitation of hierarchical and knowledge gaps, and strategic use of time allowed George and Kate to steer the creative project from the formal to the informal channel (S2), where it evolved over the next 100 days, progressing from the agreement of the creative objective (E3) all the way to the elaboration and initial validation of the execution (E7). The development and progress of the communication campaign during that period (E3-E7) remained hidden from the HQ. The combination of the three subprocesses allowed George and Kate to secure strategic autonomy and to bypass the barriers presented by HQ's global brand and process norms. The HQ guarded the global norms but did not know anything about the development of the local campaign; the advertising agency worked on the development of the local campaign without being aware of the global norms; and other executives in Subsidiary X's board were not aware of the new campaign either. By cutting-off the communication lines among all other constituencies, George and Kate secured sufficient strategic autonomy to steer the project ahead after the second switching transition (S2). This allowed the creative campaign to progress from the idea generation to the idea elaboration phase by bypassing Lusso's global brand norms, a fact that led, in turn, to the creation of novel creative communication materials that were unconventional also in comparison to Lusso's competition.

In month 4, Alice (I7) sent to Joseph (I6) an internal creative brief which asked "*which tone should be used,*" and answered "*provocative, disruptive, and confident*." While Lusso's global brand norms emphasized upscale sophistication and luxury, the creative brief mentioned that "*We want to challenge the market leader with a disruptive communication. Lusso should position itself as full of energy, tasty and invigorative*" (D7). Karin (I8) mentioned, "*We did numerous meetings and then we started thinking revolutionary, and in a brainstorming we thought of the creative idea; the inspiration was the Bananas of Woody Allen.*" In month 5, the creative proposal that the advertising agency presented to George and Kate mentioned, "*Campaign idea: Disruption in chocolate bars*" (D9). To express the 'intense' and 'ground-breaking' experience that Choco Silk hided inside, the story plot evolved around a grotesque and amusing nonconformist young man from a distant land making funny but intelligent jokes. He was dressed in unconventional rebellious clothing and he behaved in an

unrefined but passionate manner. A few days earlier, the International Marketing Manager at HQ had

sent to Kate an email stressing the importance of complying with Lusso's global brand norms (D8):

> Ensure that the reference point in the scripts is not a mediocre quality product. This will strengthen the link to the unique benefit we offer. Ensure the hero is the brand and the packs. Please use this as a guide.

The story plot proposed by the advertising agency (D9) did not comply at all with the global

brand norms (O2). George (I1) and Joseph (I7) recalled Kate's initial reaction to the creative proposal:

> Kate was shocked by the agency's creative proposal because it was against the global norms, but I took the risk to air it. You have to follow your instinct. (George, I1)

> Kate was afraid to like the creative ideas that we presented because they were against the global norms. So George gave her 'permission' to like it. (Joseph, I7)

After a few additional exchanges (O2, O3), George, Kate, and the advertising agency agreed

on the creative proposal (E6) and the implementation plan (E7). The next step involved producing the

campaign's material. It was only at that time (E7) that George informed the advertising agency that in

order to proceed they needed the formal authorization of Lusso's HQ. Joseph (I7) mentioned that,

> I don't know anything about the Center and its processes. By the way, we did not have the time to get involved with the global norms and the Center. We did know that the campaign had to be approved by the Center. It was the Marketing Director [Kate] who had to go and present the campaign for approval.

Switching Back to the Formal Channel to Secure Permission and Additional Resources (S3)

Lusso's global process norms required Subsidiaries to fill highly detailed electronic forms explaining

the refinements or/and translations in the global communication material that were required for the local

market. Evelyn, Subsidiary X's Brand Manager, and George describe the process as follows:

> The process was that we had to fill value propositions and other forms for the HQ. All decisions had to be approved by the HQ. (Evelyn, I3)

> The process was: a) the subsidiary sends the script to the Center; b) the Center provides an approval; c) the subsidiary sends the storyboard to the Center; d) the Center provides an approval; e) the subsidiary produces the communication locally; and then, sends the finished material to the Center for the final approval before airing. (George, I1)

Tellingly, Subsidiaries had to obtain not one but two formal approvals from HQ: The Global

Category Center provided written approval to each of the subsidiaries for local developments requests,

and the Global Communication function provided an additional written approval to the subsidiary for

local adaptation requests and local brand communication material developments (I1, I2, O1, O2).

George and Kate could not avoid going through this authorization process, because Subsidiary X did not have sufficient resources to finance the production and airing of the local campaign materials. As a result, they decided to switch the course of the creative project from the informal to the formal channel (S3) in order to obtain from HQ formal authorization and resources to produce the campaign locally.

George and Kate reasoned that they could not conceal the disruptive aspects of the campaign by going through Lusso's highly detailed electronic approval system. Given that the creative project had been formally designated by HQ as 'fast-track', Kate (I2) used strategically time pressure and asked the IMM whether it would be possible for him to approve the proposal through email communication, instead of the online system, in order to bring the campaign to the market as soon as possible. The IMM confirmed that it was possible. Once the electronic system was bypassed, the subprocess of selective concealment was used to bypass the barrier of the global brand norms. Kate sent an email to IMM requesting his approval of the materials. In the email she attached the script, which had been translated from its original language, after George and Kate had removed from it all elements that violated the global brand norms, such as 'disruption', 'grotesque', and 'nonconformist.' Because these elements were obvious also in the storyboards, Kate (I2) did not send the storyboards to the IMM, because the visual information that they contained would likely reveal the disruptive flavor of the campaign:

> I never communicated to them the 'Disruption' idea. I sent the translated proposal, which was a rough description of the campaign, to one of the HQ team members. We got the final approval because I think we were lost in translation! (Kate, I2)

Selective concealment was effective in that case in part because of the parallel use of two other subprocesses, exploitation of hierarchical and knowledge gaps and strategic use of time. Kate (I2) directed her requests to the IMM, who had been recently promoted to the role and lacked experience in processing authorization requests from local subsidiaries. This fact, in conjunction with Kate's strategic use of time pressure for a quick approval, led the IMM to either not spot the missing storyboards or not request them in order to avoid slowing down the project. Given that the IMM allowed Kate to bypass an essential formal procedure, the electronic system, George (I1) believed that the final authorization could be brought up for confirmation also by the regional SVP. George (I1) thought that they could take advantage of the fact that that SVP position had remained vacant for a long time and an interim SVP

had just been placed in the post: "*My boss [SVP] did not know what I was doing, because he was managing on an interim basis and he was not involved*". Eventually, the IMM confirmed to Kate (D8):

> I've just reviewed the TVC proposal with the VP Communications for the new chocolate bar product. Given the speed to market objective you have set yourselves as a team, we think you have done a great job on the communication!

In summary, as shown in Table 5, this channel switching transition (S3) involved selective concealment, strategic use of time, and exploitation of hierarchical and knowledge gaps, and resulted in the HQ providing the authorization and financial resources to produce the campaign (E8).

Going Underground to Stage a Creative Blitzkrieg (S4)

Shortly after approval and resources were obtained from HQ (E8), George and Kate informed HQ that the production of campaign materials was underway, but they concealed the content of those materials, which included tv commercials, radio commercials, posters, digital commercials, and sampling. This channel switching (S4) incident gave to George and Kate strategic autonomy to make informal decisions freed from brand and process barriers. For example, the sharp focus on producing a truly disruptive campaign (E9) was evident in the process of selecting the film director to shoot the TV commercials:

> We invited three directors and chose the one who exhibited a nonconformist behavior. He was dressed up crazy, smoked big cigars, and said really weird jokes. We thought that he could bring into life our disruptive idea in the best possible way. (Karin, I8)

While HQ's global commercial had a polished upscale style and a serious conservative tone (D3), the local TV commercials were funny, provocative, subversive, and grotesque (D10). The latter elements diverged also from the standard elements observed in the campaigns of Lusso's competitors (D2). According to Alice (I7) "*the campaign was driven by a strategy to break the status quo. We followed a revolutionary creative idea.*" Overall, in this channel switching incident (S4) we found that selective concealment allowed the creative project to secure strategic autonomy and to bypass the barrier of brand norms in order to progress to the idea implementation phase, as shown in Figure 1.

According to Lusso's global process norms, once the campaign materials had been produced, Subsidiary X should have presented them to HQ in order to request authorization to air them. Because it was impossible to send to HQ the TV commercials without revealing the tone and content of the new campaign, George (I1) decided to air the TV commercials without asking for HQ's permission:

My boss would not accept this creative route because this was not in line with the Center's norms. We produced it, we aired it, and then we sent it to them, and there was no way to take it back.

Reflecting on the airing of the commercials (E8), Thomas (I5), who until that time was not aware of them, said: "*This urgency helped to convince and to surprise the HQ. We had a blitzkrieg!*"

Switching Back to the Formal Channel to Claim Legitimacy Ex-Post (S5)

The next channel switching transition (S5) occurred a few days after the TV commercials were first aired and entailed two subprocesses: strategic use of time and shared wins framing. This time George used strategically time not in the form of time pressure, but in the form of temporal delays. He delayed informing the HQ about the airing of the campaign in order to gather early evidence about its positive reception among consumers. He then used this set of evidence in order to reveal to HQ the informal actions that he had previously concealed in a manner that could justify that the outcome was a collective win for the entire Lusso organization. Four days after the commercials were first aired, George sent an email to the SVP in which he included the link to the commercials and data about their early reception. The tone of the email was positive, confident, and collaborative. It did not make any reference to the global brand norms. Rather, it included a vague expression of gratefulness to all parties who had allegedly supported the local project. The use of a shared wins frame was evident also in the fact that, besides Kate, the CMO, and the VP Communications, George cc'ed the SGMs of all other subsidiaries:

> Friends of chocolate bars, I am excited to share with you the first reactions on our campaign with the links below. It is important to know that we are on air since last week. Only the full campaign has not unfolded yet.… I would like to thank you for your support … when we have the full results, I shall send you a full update. (D11)

Shortly after sending the above email (D11), George emailed to Kate, "*Let's see their reactions*" (D12). Many SGMs responded enthusiastically to the email congratulating George for the campaign. Although the SVP was skeptical about the unconventional approach taken by Subsidiary X, George (I1) persuaded him about the value of the campaign's outcomes: "*When I explained to my boss that the good results were due to this communication, he accepted it.*" Overall, in this channel switching incident, S5, we found that George and Kate used the subprocesses of strategic use of time, in this case temporal delay, and shared wins framing in order to claim ex-post legitimacy for a set of informal

actions that until that time they had deliberately kept secret from HQ. Although some HQ executives were skeptical about the local development of a new campaign by Subsidiary X, the SVP placed upon the campaign his ex-post seal of approval largely because of the positive market results (E11).

Returning to the Informal Channel to Roll Out the Full Creative Campaign (S6)

As soon as the SVP validated the airing of the TV campaign (E11), George and Kate took the project back to the informal channel (S6). They informed executives at HQ that Subsidiary X would continue the airing of the TV campaign, but they selectively concealed from them that, besides the three TV commercials, Subsidiary X had already produced radio commercials, digital commercials, posters, and other communication materials. Like previous incidents, George and Kate were able to exploit the lack of experience of some recently appointed HQ executives in order to effectively conceal the existence of additional campaign material. This channel switching transition (S6) allowed them to bypass once again Lusso's global process norms and to air the full campaign (E12) without approval (O5, O6).

Switching Between Formal and Informal to Shape the Context of Evaluation (S7 and S8)

The next channel switching incident, S7, occurred shortly after and it combined strategic use of time and shared wins framing. While the full campaign was running (D13, O5, O6), Kate waited until sufficient positive evidence were generated, and only then she informed HQ about the airing. This time she also requested from HQ to commission its own consumer evaluation study by an international research agency. The purpose of this request was to signal Subsidiary X's confidence about the impact of the local campaign, and also to allow HQ to assess independently its success. The HQ replied positively and commissioned a consumer evaluation study (E13). George and Kate initiated then another channel switching transition, S8, which included only selective concealment. As soon as they requested from HQ to commission a study, they secretly initiated a local extensive financial and market analysis of the impact of the campaign (E14). They expected the consumer evaluation commissioned by HQ to show that the campaign had good but also polarizing results due its unconventional character. They wanted to use the results of their own financial and market analysis to persuasively explain to HQ that the campaign had produced positive results despite the polarization among consumer perceptions.

As shown in Table 5, this channel switching transition (S8) provided George and Kate with the strategic autonomy to shape the context of evaluation of the campaign that was just about to happen next.

Returning to the Formal Channel to Stage a Happy Ending for All (S9)

The international research study confirmed the expectations of George and Kate. This led to the last channel switching transition, S9. Kate and George waited first for HQ to receive the results of the consumer evaluation study. The international research agency's qualitative report described the campaign as "*creative in a grotesque and interesting way*", "*disruptive*", and "*impactful*" (D14):

> This is a disruptive campaign overall that attracts attention and increases the differentiation and distinction of the new product against competition. It conveys a character of contemporariness and difference. It conveys an aura of newness, innovation and uniqueness. (D14)

Next, instead of sending the results of their own financial and market analysis to HQ, George (I1) and Kate (I2) invited HQ executives to visit Subsidiary X's country to experience personally the campaign and witness the impact it was having in the local market (O7). This channel switching transition, S9, combined strategic use of time, specifically temporal delay, and shared wins framing, and as shown in Table 5, it strengthened ex-post the legitimacy of the creative project. In month 10, the SVP Europe, the CMO, and the VP Communications formally visited Subsidiary X (E15). George, Kate, and the other Board members of Subsidiary X presented to HQ executives the positive financial and market results, took them on a city tour to experience the airing of the ChocoSilk campaign, and gave them t-shirts to wear that featured the campaign's creative slogan, "*Honor the Disruption!*" (O7):

> We took them around to experience the campaign. We showed to them the initial very positive results. We explained to them that this was a team success! They were impressed by the results so after the visit they produced a short video with the local communication and distributed it to all other countries. When the positive results were present, this was everybody's success. (Kate, I2)

The Aftermath

A year after ChocoSilk was launched, Subsidiary X achieved a double-digit turnover growth, doubled its market share, and tripled the spontaneous local awareness of the Lusso brand (D15). The ChocoSilk campaign won a prestigious national communication award for its novelty and market performance (O9, O10). At the HQ's invitation, George presented the campaign's outstanding results in Lusso's

global annual meeting. Introducing an interview with Kate, the editor of a marketing magazine in Subsidiary X's country wrote that (D16), "*The launch of the new chocolate bar product revitalized a stagnated market and led Subsidiary X to undertake a leading role in the development of the global strategies of Lusso*." Subsidiary X initiated a second of wave of the campaign which lasted about one year (O8). HQ's financing behind the Choco Silk communication continued for four years after the initial launch. In the meantime the HQ established new strict global norms that reflected its new strategic priorities. A new global creative campaign was developed and eventually replaced the local ChocoSilk campaign. From that point onwards, the local market share of ChocoSilk started to decline and the brand was eventually harvested following Lusso's global strategy. By that time, however, ChocoSilk had helped Subsidiary X meet its goals and become much stronger in financial and market share terms.

A Grounded Theory of Channel Switching

Elaborating on our data, in Figure 3 we propose a process model of channel switching during the evolution of creative projects. We suggest that creative projects may start, evolve, and end in the formal or in the informal channel. At any given point, creative projects in the formal channel may not be able to further evolve due to the lack of access to the formal means they need. At that point creative projects may be aborted. Alternatively, they may switch course to the informal channel, which allows them to secure the means they need and to further evolve informally. Conversely, creative projects in the informal channel may not be able to further evolve due to the lack of alternative means to the formal means that they need. In such cases, creative projects may be aborted, or they may switch course to the formal channel, which allows them to secure the means that they need and to further evolve formally.

The creative project that we studied followed at first the informal-to-formal path illustrated by the red line in Figure 3. The project started in the informal channel, when George decided to develop a local campaign (E1 in Figure 1), but shortly after it could not further evolve due to insufficient resources and lack of authorization; these means were not available in the informal channel. This triggered a switching incident (S1) that allowed the creative project to acquire legitimacy and secure resources from HQ in the formal channel (E2). At that point, the creative project started following the formal-to-informal path illustrated by the blue line in Figure 3. Shortly after the HQ had provided authorization

and resources (E2), the creative project could not further evolve in the formal channel because Lusso's global brand and process norms did not allow access to any formal means for producing locally a new and disruptive communication campaign. This led to the next switching transition (S2), which allowed the creative project to bypass the barriers of the global brand and process norms and to secure strategic autonomy. This enabled the creative project to further evolve in the informal channel over the next 100 days (E3 to E7). As depicted in Figure 3, and as evidenced in Figure 1, our creative project continued to alternate between the red and blue paths, the informal and formal channels, throughout its evolution.

---insert Figure 3 here---

The chronological analysis of our data revealed that a creative project may involve a number of channel switching incidents, which occur across all phases of the creative process and entail both directions of transition. In order to understand the importance of these channel switching incidents, we conceptualized creative project evolution first as a sequence of events that unfold linearly over time, as shown in Figure 1; and later as a series of iterations of a recursive channel-switching process, as shown in Figure 3. Regardless of the conceptual lens used, we concluded that channel switching transitions catalyze key evolutionary milestones during the unfolding of a creative project. We suggest, therefore, that dual-channel evolution becomes possible through a series of frequent and bidirectional channel switching transitions that may occur throughout the duration of a creative project.

Next, to investigate the bidirectionality of channel switching transitions, we examined their triggers. Our between-incidents analysis showed that all formal-to-informal channel switching incidents (S2, S4, S6, S8) were triggered by the lack of access to the formal means the creative project needed in order to evolve. In those cases, formal means did not exist (e.g., the development of local campaigns was not permitted); were not suitable for the creative project (e.g., the global TV campaign); or otherwise could not be used (e.g., the electronic approval system). Conversely, all informal-to-formal channel switching transitions (S1, S3, S5, S7, S9) were triggered by the lack of informal alternatives to the formal means (e.g., resources, approvals, legitimacy) the creative project needed in order to evolve. For example, the lack of informal alternatives to formal resources led George and Kate twice to formally request from HQ the resources that were needed to finance the initial development of the campaign (S1) and later the production and airing of its materials (S3). We suggest, hence, that the lack of access to

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the formal means a creative project needs in order to further evolve in the formal channel triggers switching transitions to the informal channel, as illustrated by the blue line in Figure 3; while the lack of informal alternatives to the formal means a creative project needs in order to evolve in the informal channel triggers switching transitions to the formal channel, as illustrated by the red line in Figure 3.

To understand the frequency of channel switching incidents, we examined the stability of access to formal and informal means throughout the duration of the creative project. We found that the creative project had variable levels of access to multiple means across multiple times. Because the level of access to each of these means fluctuated during the course of the project, more than one switching transitions were undertaken in order to access the same means at different times. For example, switching incidents S1 and S3 accessed resources, and switching incidents S2, S4, and S8 accessed strategic autonomy. In addition, due to the multiplicity of means required by the project, even if access to a given means was temporally achieved in one channel, the creative project could still switch path to the other channel in order to access other means that were needed at that time. For example, shortly after the creative project secured legitimacy and resources at E2, it quickly switched channel (S2) in order to bypass barriers and secure strategic autonomy. We propose, therefore, that the temporal length of a creative project, the multiplicity of the means that it needs to access, and the variable levels of access to those means during its evolution are three factors that increase the frequency of channel switching incidents.

As far as the internal dynamics of the channel switching incidents are concerned, our coding analysis showed that they are propelled by four subprocesses: selective concealment, strategic use of time, exploitation of hierarchical and knowledge gaps, and shared wins framing. Our within- and between-incidents comparisons revealed that each subprocess entails two elements (the second order themes in Figure 2), and that the four subprocesses differ across five layers of complexity: the patterns of interrelationship between their constitutive elements; the time period of the creative project in which they are more likely to appear; their behavioral targets; the direction of the channel switching incidents in which they are implicated; and the patterns of combination that they form with the other subprocesses.

Selective concealment consists of two elements, selected actions revealed and selected actions hidden. In our study these two elements were used always in unison (S1, S2, S3, S4, S6, S8). Hence, while in formal and in informal evolution the creative project can remain, respectively, completely

visible or completely hidden, in dual-channel evolution the creative project remains partially visible and partially hidden, as shown in Figure 1. Although selective concealment was used throughout the creative project, it was relatively more important in the early and middle periods when it was vital to conceal from HQ key aspects of the project. Selective concealment was directed towards HQ executives and also towards executives of the local board and the local advertising agency. In addition, selective concealment was used in switching transitions to both directions. Overall, we found that selective concealment is a versatile subprocess that can be used on its own (S4, S8) or in combination with the other subprocesses (S1, S2, S3, S6, S8). In our study, selective concealment was particularly effective when it was used together with strategic use of time and exploitation of hierarchical and knowledge gaps in order to either secure key formal decisions (S1, S3) or bypass formal barriers (S2).

The second subprocess, strategic use of time, encompasses two elements, use of time pressure and time urgency, and use of temporal delays. In our study these two elements were used separately and at different time periods. Time pressure and time urgency were used in the early phases, in combination with selective concealment and exploitation of hierarchical and knowledge gaps, in order to secure key decisions and bypass barriers (S1, S2, S3). Temporal delays instead were used in the idea implementation phase, in combination with the subprocess of shared wins framing, in order to claim legitimacy ex-post (S5, S7, S9). Strategic use of time was used in both directions of channel switching, and it was directed mainly at HQ executives, but also at the executives of the advertising agency.

The third subprocess, exploitation of hierarchical and knowledge gaps, entails two elements: the exploitation of senior-level role gaps, which was manifested in our study in one incident that involved the interim SVP (S3); and the exploitation of knowledge gaps, which involved four incidents with other HQ executives (S1, S2, S3, S6). This subprocesses was used in both directions of channel switching, and it was particularly important in the early phases of the project when it was used in combination with selective concealment and strategic used of time, as mentioned above.

The fourth subprocess, shared wins framing, consists of two elements that are used sequentially: first gathering evidence of wins, and then sharing and experiencing these wins with other key actors. Shared wins framing was used only in the idea implementation phase, when the project had generated some tangible positive results, and only in transitions from the informal to the formal channel (S7, S8,

S9). Moreover, it was directed mostly towards HQ executives, and it was combined only with strategic used of time, specifically with the use of temporal delays, in order to gather evidence of wins. Although the frequency, directionality, and behavioral targets of shared wins framing were more limited in comparison to the other three subprocesses, it played a key role in helping the project preserve its legitimacy in the organization after its informal and unconventional aspects became widely known.

We discerned in our findings three overarching configuration patterns among the four sub-processes. The first pattern involved all formal-to-informal channel transitions (S2, S4, S6, and S8); was manifested across all phases of the creative project; aimed at bypassing barriers and securing strategic autonomy; and was marked by the dominant role of selective concealment. Two of those transitions (S4, S8) involved only selective concealment while in the other two (S2 and S6) the role of the other subprocesses involved (strategic use of time and exploitation of hierarchical and knowledge gaps) was mostly supportive to selective concealment. Selective concealment appears to play thus the central role in taking a creative project 'underground.' Our findings also lead us to the conclusion that selective concealment is enabled by individual-level autonomy, which emerged, in our study, from two sources: the key actors' formal hierarchical role (e.g.., George was the SGM) and the geographical distance between the creative project's geographical and the main control unit (ie. Lusso's HQ).

The second pattern involved the informal-to-formal channel transitions (S1 and S3) that were aimed at *ex-ante* preserving the legitimacy of and securing resources for the creative project during the preparation and idea elaboration and idea championing phases. These two channel switching incidents were propelled by the powerful combination of three subprocesses: selective concealment, which played the dominant role; strategic use of time, in the form of time pressure and time urgency, which strengthened the effect of selective concealment by shortening the temporal horizon available to senior HQ executives to discover what was being deliberately concealed from them; and exploitation of hierarchical and knowledge gaps, which further strengthened the effect of selective concealment by directing formal authorization requests to senior executives who lacked the depth of knowledge or/and experience required in order to discern what was concealed from them behind these requests. While selective concealment was enabled by individual-level autonomy, as noted earlier, the other two sub-processes were more closely related to opportunistically exploiting situational dynamics.

The third pattern involved the informal-to-formal channel transitions (S5, S7, and S9) that were aimed at preserving the project's legitimacy *ex-post* during the implementation phase. These transitions were propelled by the combination of shared wins framing, which played the dominant role; and strategic use of time, in the form of temporal delays, which strengthened the effects of shared wins framing by prolonging the time period available for gathering concrete evidence of wins.

Overall, because creative projects assess a multitude of means and are temporally and structurally complex, different incidents of channel switching may encounter different challenges. As a result, channel switching is a complex and flexible rather than fixed process. We propose, therefore, that channel switching is propelled by four versatile subprocesses--selective concealment, strategic use of time, exploitation of hierarchical and knowledge gaps, and shared wins framing--which encompass five layers of complexity, a fact that allows them to flexibly form various configurations in order to respond to variable exigencies encountered across a number of channel switching transitions.

Finally, to examine the impact of channel switching transitions, we analyzed whether and how they helped the creative project move on. As shown in Figure 1 and in Table 5, all nine incidents had a positive impact on the evolution of the creative project across all four phases. As shown in Figure 3, formal-to-informal channel switching transitions foster creative project evolution by passing barriers or/and by securing strategic autonomy, while informal-to-formal transitions foster creative project evolution by preserving legitimacy or/and by securing resources. Through these four mechanisms, channel switching allows the creative project to evolve in a different channel by obtaining the means it cannot access in the other channel. While the creative project that we studied started in the informal channel (E1) and ended successfully in the formal channel (E15), Figure 3 acknowledges that creative projects may start and end in either channel and with variable levels of success. We also address the obvious possibility that the creative project may be aborted at any time due to either the lack of access to formal means or the lack of alternatives to formal means. In any of these two cases, channel switching may provide creative projects with another chance to evolve, as illustrated by the blue and red line paths in Figure 3. Our process model posits that these two paths are constitutive dimensions of dual-channel evolution and are realized through a complex and versatile process of channel switching.

General Discussion

To date, most streams of creativity research have examined creative projects that evolve only through formal channels. Terms such as 'bootlegging' and 'creative deviance' do not even appear in the three foundational theories of the field (Amabile, 1988; Ford, 1996; Woodman, Sawyer, & Griffin, 1993) and in most integrative literature reviews (e.g., Anderson et al., 2014; George, 2007; Shalley & Zhou, 2008). As a result, the more recent research stream that studies bootlegging and creative deviance has focused its efforts, to date, on explaining what differentiates evolution in the less studied informal channels from evolution in the more well-studied formal channels. This tendency has led, probably unintentionally, to an implicit 'either/or' view of the relationship between formal and informal channels. Our paper contributes a long due 'both-and' view on creative project evolution. To the best of our knowledge, the model that we propose in Figure 3 constitutes the first attempt of organizational creativity research to move beyond single-channel conceptualizations and to theorize the process of dual-channel evolution.

Our work refines and enhances structural strain theories of creative evolution (Criscuolo et al., 2014; Mainemelis, 2010). While past research has argued that a low degree of structural strain promotes evolution in the formal channel, and a high degree of structural strain promotes evolution in the informal channel (Globocnic, 2019; Petrou, et al., 2018; Tenzer & Yang, 2020), our study shows that, because creative projects have partial or/and fluctuating levels of access to multiple means during their evolution, the degree of structural strain is variable, a fact that triggers a dual-channel evolutionary path propelled by a number of channel-switching transitions. Our dual-channel theory contributes hence a less static and more precise view of the multiple effects of structural strain on creative project evolution.

Moreover, while past research has stressed that lack of access to formal means triggers informal evolution, it has underplayed the fact that in some situations informal evolution may not be possible. Our study shows that there are occasions where creative projects return to the formal channel because they cannot evolve in the informal channel due to the lack of viable alternatives to the formal means they need. Augsförder (2005: 2) noted that bootlegging in R&D contexts "is neither in the department's action plans nor any formal resources [are] allocated to it," but rather, occurs when researchers take the initiative to work on the project and "there is no management control to stop their creative freedom."

In contrast, our study was conducted in a large multinational corporation that had in place a plethora of controls to restrict creative freedom. In addition, the campaign that we studied could not be financed by anything else other than resources from the HQ. Overall, our findings about the multiple and variable drivers of channel switching capture in a more detailed and ultimately more realistic manner how such critical exigencies of practice lead creative projects to engage in dual-channel evolutionary trajectories.

While creative projects can start and be completed in the formal channel without ever switching to the informal channel (e.g., Sutton & Hargadon, 1996), creative projects in the informal channel cannot end successfully without switching at some point to the formal channel in order to gain legitimacy (Criscuolo et al., 2014; Mainemelis, 2010; Obstfeld, 2012). Although past research has acknowledged the occurrence of channel switching, it has not formulated theoretical insights about it, to date. Our work implies that the scope of research on bootlegging, creative deviance, and other forms of informal evolution should be broaden to become, in essence, the study of dual-channel creative evolution. Towards that direction, the channel-switching process theory that we propose encompasses but also goes beyond the more static and narrow concepts of bootlegging and creative deviance.

The model that we develop contributes a missing theoretical link between, on the one hand, the variable conditions that impel creative projects to follow at times formal and at other times informal channels; and on the other hand, the differential mechanisms through which the two directions of channel switching allow creative projects to further evolve. Moreover, our process theory addresses in detail the frequency, content, directionality, and patterns of channel-switching. Like Fisher et al. (2018), who found that complex projects entail multiple behavioral dynamics that do not adhere to a single process, we found that channel switching is not driven by a single process. Rather, our grounded theory identifies four versatile subprocesses that propel channel switching transitions, and explicates how the four subprocesses form different patterns in different frequencies and at different times in order to exert differential influences over different target groups so as to allow the creative project to further evolve.

Another implication of our dual-channel model is that it stresses the need for connecting the findings of research conducted separately in formal and informal contexts. For example, Dutton et al. (2001) portrayed the formal organization as a "pluralistic marketplace of ideas," where individuals' chances of "selling" their ideas are linked to their ability to frame, package, bundle, present, and

politically support them (see also Grosser et al., 2018). In contrast, Mainemelis (2010: 572) argued that in some pivotal moments in the evolution of creative ideas their fate "is not determined by persuasive "trading" in the "marketplace of ideas" but by bold acts of rule breaking." Our study contributes a more integrative perspective in which persuasive trading (e.g., Kate's stylized requests to HQ) and bold acts of rule breaking (e.g, George's decision to air the campaign without HQ's permission) co-exist synergistically, albeit not always simultaneously, as milestones in the evolution of the same project.

Finally, creativity research has long argued that creative work is influenced by relatively stable individual perceptions of proximal contextual factors, including autonomy, resources, bureaucratic barriers, and organizational legitimacy (Amabile et al., 1996; Amabile & Pratt, 2016; Anderson et al., 2014; George, 2007; Shalley & Lemoine, 2018; Shalley & Zhou, 2008). Our study suggests that these factors are indeed vital for dual-channel evolution, however, they are not temporally stable. The process model of channel switching that we propose is recursive precisely because creative projects may need to secure autonomy, resources, or/and legitimacy, and to bypass bureaucratic barriers, not once but several times during their evolution. Modeling these factors as variable further implies that dual-channel evolution is likely to be initiated and guided by a subset of actors in the organization who perceive the proximal work context for creativity as malleable and accessible rather than as static and fixed (Mainemelis, 2010). This agentic mindset (Emirbayer & Mische, 1998; Obstfled, 2012), in conjunction with the variable levels of access to multiple means, give rise to creative projects that curve novel dual-channel evolution paths in order to pursue novel ideas in the organizational context.

Implications for Organizational Practice

Senior corporate leaders may perceive channel switching as a breach of trust by 'rebel' employees, while the latter may perceive the policies and norms imposed by the organization's formal channels as 'bureaucratic barriers to creativity' (Criscuolo et al., 2014; Lin et al., 2016; Petrou et al., 2020). Our study invites managers and employees to look beyond these visible phenomena and reflect on how their organization's deep social structure may systematically trigger situations where creative projects bypass formal barriers to creative evolution. Our dual-channel model offers a practical diagnostic tool that reveals some intriguing tensions surrounding the pursuit of creativity in organizations. The two key

actors in our study faced a rather peculiar choice between either conforming to the company's normative expectations but failing to meet its performance expectations, or violating its normative expectations in order to meet its performance expectations. The company itself was in a paradoxical situation between, on the one hand, promoting a spirit of local agility and innovation in order to compete globally, and on the other hand, suppressing local deviations from its centralized global procedures in order to be efficient. Our study invites senior leaders to reflect on whether and how their organization's formal policies and norms could be redesigned in order to foster rather than hinder the evolution of creative projects through formal channels. Alternatively, insofar as the aforementioned paradoxical tensions are perpetuated in organizational life, our work informs practitioners that dual-channel evolution is likely to continue offering practical, albeit not final, resolutions. The creative project that we studied sought not to permanently replace but to bypass the organization's established norms. The results of channel switching, however, were important and lasting, rather than trivial or ephemeral, for they created a new and better reality for the local subsidiary. Our work can help thus practitioners recognize the deeper social structural reasons that trigger dual-channel creative project evolution, and also to appreciate its potentially positive consequences. In addition, our study informs managers that by embracing a sharper results orientation, faster working rhythms, and higher career mobility in the work context, they are likely to also strengthen, albeit unintentionally, three subprocesses of channel switching: shared wins framing, strategic use of time, and exploitation of hierarchical and knowledge gaps, respectively.

Boundary Conditions

Our theory applies to organizations with at least a minimal degree of formalization of processes and centralization of decision-making. The former makes theoretically meaningful the distinction between formal and informal channels, while the latter makes theoretically meaningful the subprocess of selective concealment. Our model may not apply thus to purely ad-hoc and decentralized work contexts. These two boundary conditions, formalization and centralization, are observed, albeit in variable degrees, in most organizational settings (Criscuolo et al., 2014). Furthermore, the availability of positive creative project results is an obvious boundary condition of the subprocess of shared wins framing, while the presence of hierarchical or knowledge gaps is a boundary condition of the subprocess of

exploiting hierarchical and knowledge gaps. Insofar as one of these boundary conditions is not met, we reiterate that our model posits that channel switching may still occur through the other subprocesses.

Limitations and Future Research Directions

Given that our study was conducted in a work context characterized by high degrees of centralization and standardization of global norms and processes, future studies can examine how channel-switching is manifested in smaller work contexts or/and in contexts with relatively higher degrees of flexibility and autonomy (e.g., Mainemelis & Epitropaki, 2013). In addition, while the creative project that we studied resulted in positive outcomes, it is certainly possible that in other cases channel switching may not lead to positive results. Future research may employ multiple-case designs in order to identify the factors that influence various outcomes of channel switching in various organizational settings.

The four channel-switching subprocesses that we have identified offer to future research several opportunities to revisit more static or/and more limited conceptualizations in the field. For instance, while past research has argued that bootlegging is usually hidden in the informal channel (Augsforder, 2005; Criscuolo et al., 2014), our study shows that a more strategic way to hide a creative project is by selectively keeping some of its parts visible. This allows the creative project to maintain legitimacy in the formal channel and to benefit from access to resources, while also maintaining its strategic autonomy in the informal channel. Future studies may further investigate hence the dimensions, timing, conditions, and tactics surrounding the deliberate deployment of selective concealment.

Moreover, past research has argued that senior teams with more stable membership promote more incremental forms of creativity, while changes in the composition of a senior team tend to spark cognitive differentiation, which fosters, in turn, the production of novelty that departs more radically from the organization's status quo (O'Reilly & Tushman, 2008). We found that reduced membership stability in HQ, in the form of hierarchical and knowledge gaps, fosters (albeit unintentionally) novel deviations from established pattern of actions also by weakening the effectiveness of normative gatekeeping. Taking into account the increasing rates of boundaryless creative careers and temporary creative organizations (Lingo, 2018; Lingo & O' Mahony, 2010; Mainemelis et al., 2015), the role of hierarchical and knowledge gaps in creative project evolution may have far reaching implications across

a broad range of organizational contexts. This is another promising direction for future research.

In addition, while past research has linked informal evolution to the search for higher levels of project-level strategic autonomy (e.g., Criscuolo et al., 2014), our study reveals that the individual-level autonomy related to one's hierarchical role (our two key actors were senior leaders of the subsidiary) is a key enabler of the channel-switching process that secures higher levels of project-level autonomy. It would be useful hence to further investigate the associations among individual agency (Emirbayer & Mische, 1998), hierarchical position and other sources of individual autonomy, and channel-switching. Future studies may also examine whether and how the frequency of dual-channel evolution varies across work contexts. For instance, given the tendency of many organizations to provide higher degrees of individual autonomy in order to facilitate creativity (Amabile et al., 1996; Amabile & Pratt, 2016; Anderson et al., 2014), it is plausible that channel-switching incidents are more frequent in organizations that place a higher value on creativity as a desirable work outcome (Mainemelis, 2010).

Another limitation of our study is that we didn't analyze in depth the perceptions of risk involved in dual-channel evolution. We note earlier that the protagonists in our study faced a rather peculiar choice between either conforming to the company's normative expectations but failing to miss its performance expectations; or violating its normative expectations in order to meet its performance expectations. While in the former case the personal risk of performance failure is related to conformity, in the latter case the personal risk of suffering normative sanctions is related to nonconformity. Future research can examine in a more focused and detailed manner these two different types of risk in dual-channel evolution, as well as how they are influenced by personal factors (e.g., rebelliousness trait, Petrou et al., 2020) and contextual conditions (e.g., tolerance for nonconformity, Mainemelis, 2010).

In addition, while we have focused on how channel switching influences the evolution of creative projects, future research can examine the link between channel switching and creativity at other levels of analysis. At the micro-cognitive level, channel switching may influence the idea generation phase (Perry-Smith & Mannucci, 2017), specifically the framing of the problem at hand (Amabile & Pratt, 2016). For example, in our study, switching transition S2 not only did not allow Lusso's global brand norms to infiltrate the problem framing process of the campaign's objective, but it also explicitly directed the problem framing process towards challenging these very standards of communication, a

fact that stimulated, in turn, the development of a novel and disruptive campaign. Future studies can examine in greater detail how the channel switching process may protect creative projects from the bias towards new and especially controversial ideas (Mueller, Melwani, & Goncalo, 2012).

Research has also shown that project leaders may make use of nexus practices by acting at times as tertius iungens brokers (by bringing certain collaborators together) and at other times as tertius gaudens brokers (by keeping certain collaborators apart). Such dual 'nexus' approach fosters the integration of information while protects the creative process from becoming chaotic, with too many disparate voices contributing to the project (Lingo, 2018; Lingo & O'Mahony, 2010; Obstfeld, 2005, 2012). In our study, George and Kate extracted heterogeneous inputs from different collaborators (ie. legitimacy and resources from HQ, intelligence and novel ideas from the local agencies), but they also cut off the communication lines among these constituencies. We believe that in the future it would be worthwhile to examine in greater detail the relationship between channel switching and brokerage.

Finally, recent metatheory has argued that in contexts where creative work is complex and collaborative, creativity is often manifested as "the synthesis of the creative vision and inputs of the leader (or multiple leaders) with the heterogeneous creative inputs of other team members" (Mainemelis et al., 2015: 438). This was the case in our study, considering that the final creative campaign emerged from the collaboration among George, Kate, and the local agencies. Past research has found that the act of synthesizing heterogeneous creative elements into an integrated final creative product is rarely free of barriers, tensions, and conflicts (e.g., Lingo & Mahoney, 2010; Mainemelis & Epitropaki, 2013; Obstfeld, 2012). It usually takes a great deal of political skill for a leader to steer the creative project safely to its intended destination (Kanter, 1988; Mumford et al., 2018), especially when the creative project involves the transgression of the organization's normative boundaries (Mainemelis et al., 2015). Future research can explore the possibility that in such contexts the ability to effectively initiate and steer channel switching transitions may actually be a critical component of creative leadership. This line of inquiry would be important also considering that, as the title of our paper suggests, channel switching is an intricately complex process that requires the artful deployment of four versatile subprocesses over protracted periods of time.

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Table 1　　　　　**Overview of Observational Data**

Code	M	Description	Location	Type of Data
O1	1,2	Participant observation: Meetings/Discussions with: SGM, SMD, and the CEO of the advertising agency (n=9)	Office/Virtual	Summary of reflective notes
O2	3	Participant observation: Meeting with SGM and SMD to discuss the Advertising Agency's Creative Proposal (n=1)	Subsidiary X Office	Summary of reflective notes
O3	5	Participant observation: Meeting with the advertising agency's CEO to discuss the Creative Proposal (n=1)	Subsidiary X Office	Summary of reflective notes
O4	6	Non-participant observation: Presentation of creative communication to Subsidiary X's personnel (n=1)	Subsidiary X Office	Photos (n=27)
O5	7	Non-participant observation: Deployment of creative communication	3 Stores	Photos (n=48)
O6	8	Non-participant observation: Deployment of creative communication	Outdoor	Photos (n=60)
O7	10	Non-participant observation: Subsidiary X's meeting and other preparations in order to welcome the executives from the HQ (n=1)	Subsidiary X Office	Summary of reflective notes
O8	12	Non-participant observation: Deployment of creative communication, second wave	TV, Digital	Photos (n=25)
O9	15	Participant observation: Meeting with SMD to prepare the submission to the National Awards' competition (n=1)	Subsidiary X Office	Summary of reflective notes
O10	15	Non-participant observation: Formal National Awards Ceremony	Hotel	Photos (n=12); Brief notes

Table 2   **Overview of Interview Data**

Code	Name	Location	Position	Number of Interviews
I1	George	Subsidiary X Office	Subsidiary General Manager (SGM)	2
I2	Kate	Subsidiary X Office	Subsidiary Marketing Director (SMD)	2
I3	Evelyn	Subsidiary X Office	Subsidiary Brand Manager (SBM)	1
I4	Zoe	Subsidiary X Office	Subsidiary Brand Manager (SBM)	1
I5	Thomas	Subsidiary X Office	Subsidiary Human Resources Director (SHR)	1
I6	Joseph	Advertising Agency	CEO	2
I7	Alice	Advertising Agency	Account Director	1
I8	Karin	Advertising Agency	Creative Director / Ideator	1

Table 3   **Overview of ChocoSilk Documentation Data**

Code	M	Description
D1	1	Company Press Releases (n = 4)
D2	1	Previous Lusso and competitors' communication campaigns (n=3)
D3	1	HQ's TV commercial for ChocoSilk (n=1)
D4	1	International research agency's consumers perception research report (101 slides)
D5	3	Local research agency's focus group research report (68 slides)
D6	4	Local research Agency's ethnographic research report (130 slides)
D7	4	Creative brief from Account Director to Creative Director/Ideator
D8	5	Email from International Marketing Manager to SMD
D9	5	Creative proposal from the advertising agency (16 slides)
D10	7	Formal campaign launch: TV commercials (n=3)
D11	7	Email from SGM to SVP and other SGMs and HQ executives
D12	7	Email from SGM to SMD
D13	7-10	Full campaign launch: Radio commercials, posters, and digital material.
D14	8	International research agency's consumer evaluation qualitative research report (68 pages)
D15	20	Summary of Market report (164 pages)
D16	22	SMD's interview to the press

Table 4   Representative Interview Excerpts, Observation Notes, and Archival Material

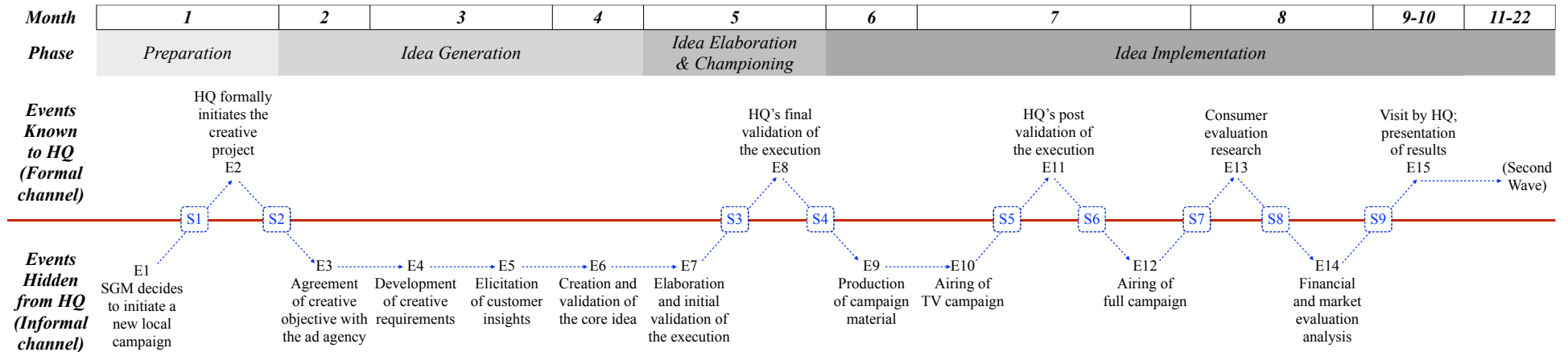| Aggregate Themes	Second-Order Themes	First-Order Themes	Representative Examples
Selective Concealment	Selected actions revealed	Partial communication of actions	SGM (I1): *"I showed my boss the campaign after we begun this process."*
		Actions revealed to selected stakeholders	Observations (O1, O2, O3): At that time the only people who were aware of the development of a new campaign were Subsidiary X's SMD, SPD and BM; the ad agency's CEO, Account Director, and Creative Director; and the research agency's CEO and Account Director.
	Selected actions hidden	Partial avoidance of communication	Documentation (D5) and Observations (O1): The insights from the ethnographic research report were shared with the advertising agency without the HQ knowing about this.
		Partial concealment of information	Documentation (D6): The creative brief did not mention the names of the individuals who participated in the meetings.
Strategic Use of Time .	Use of time pressure and time urgency	Communication of time urgency	SBM (I3): *"We had to move very quickly, but at the same time we did not want to do something without HQ's approval. For sure there were some process steps that we did not follow because of the speed to launch that we needed to achieve."*
		Setting tight project deadlines	Observations (O1): The SGM said that they need to create their own campaign now. There is no time to wait from HQ to do something about it.
	Use of temporal delays	Delayed communication of completed actions	SGM (I1): *"We produced it, we aired it and then we sent it to the HQ and there was no way to take it back."*
		Temporal delay of planned actions	Observations (O5, O6, O7): The full campaign was not aired at the same time. First the TV commercials was launched, then the outdoor campaign followed, and finally the sampling was conducted.

Exploitation of Hierarchical and Knowledge Gaps	Exploitation of senior-level role gaps	Hierarchical positions unoccupied	Observations (O1): The SGM took advantage of the absence of a formal line manager and he progressed the creative project until the airing of the first part of the campaign.
		Recent senior-level appointments	Press release (D1): (announces changes to the Board).
	Exploitation of knowledge gaps	Lack of functional expertise	Observations (O1): In the meeting it was made evident to all participants that the SMD could negotiate easier about the release of the local resources as the new functional leaders at the HQ did not have extensive experience.
		Lack of in-depth understanding of market, processes and norms	HR Director (I5): "At *the beginning the HQ had difficulty to understand anything."*
Shared Wins Framing	Gathering evidence of wins	Commission of business/market research	HR Director (I5*): "For some time we saw market share gains. But I remember how satisfying it was to be able to block competition from entering this segment."*
		Collection of financial performance data	Documentation (D15): The presentation to the HQ showed that the Subsidiary gathered financial data for the company's performance on a daily basis. The data drawn from months 6 and 7 showed a significant turnover and profitability growth.
	Sharing and experiencing wins	Communication of positive results	Observation (O3, Photos n=27): The HQ team visited the Subsidiary's premise. Promotional stands featuring the campaign were created in the outdoor area and the visitors tasted the product and talked to the personnel who was serving the bars from the stands. Next, the SMD drove the HQ managers to the roads where they had the opportunity to admire the street campaign.
		Creation of live experiences of success	HR Director (I5): *"We all became ambassadors of this revolutionary idea."*

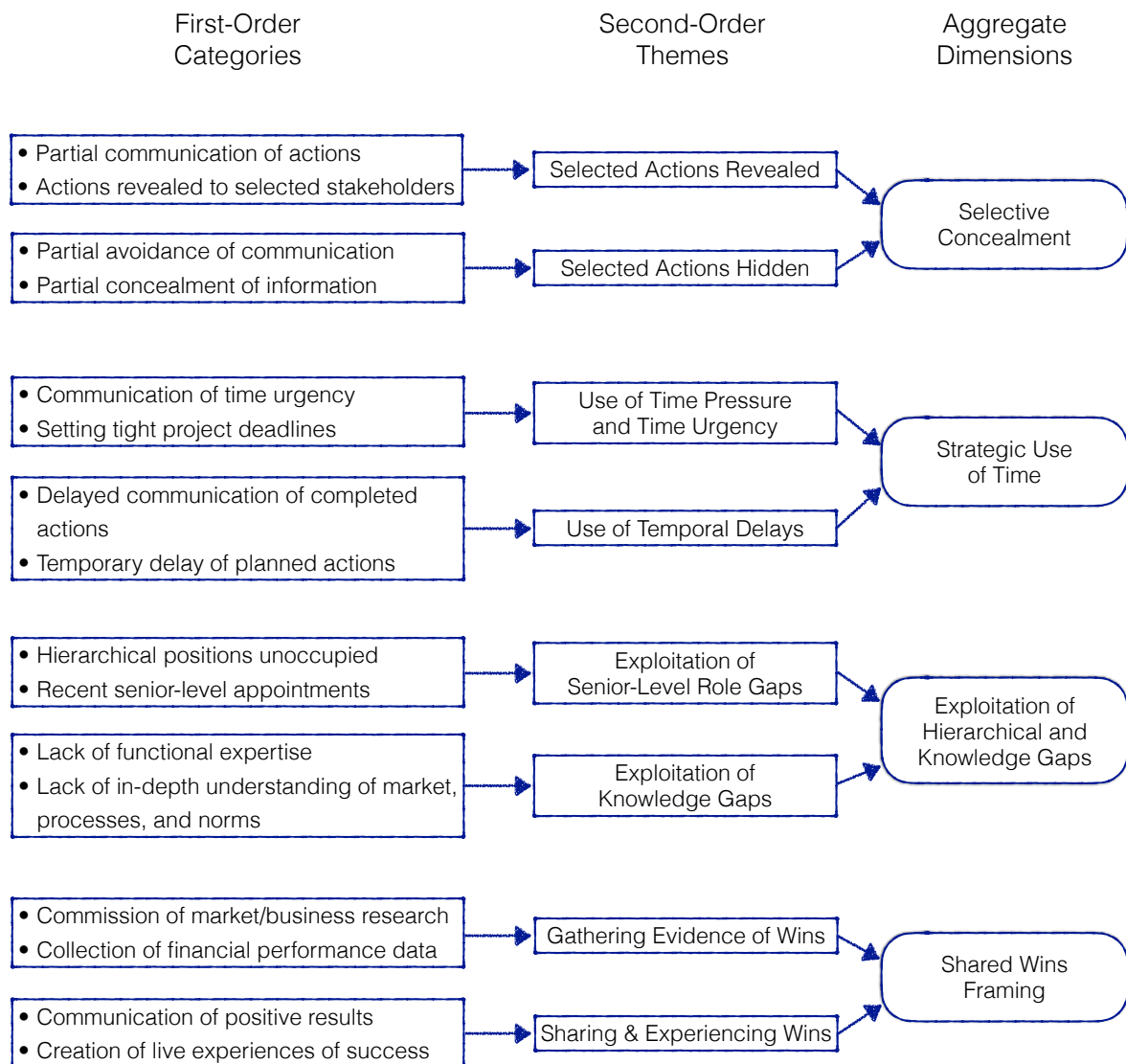**Table 5**   **Summary of Analysis of Channel Switching Incidents**

Stage	Month	Switching from event #	Switching to event #	Switching # and type	Switching subprocesses involved in the incident	Consequences of switching for the creative project
Preparation	1	E1 SMG decides to initiate a new local campaign	E2 HQ formally initiates the creative project	S1 From Informal to Formal	Selective concealment; Strategic use of time; Exploitation of hierarchical and knowledge gaps;	Preserving legitimacy (ex-ante); Securing resources
Idea Generation	2	E2 Initiation of creative efforts	E3 Agreement of creative objective with the ad agency	S2 From Formal to Informal	Selective concealment; Strategic use of time; Exploitation of hierarchical and knowledge gaps	Bypassing barriers; Securing strategic autonomy
Idea Elaboration & Championing	5	E7 Elaboration and initial validation of the execution	E8 Final validation of the execution	S3 From Informal to Formal	Selective concealment; Strategic use of time; Exploitation of hierarchical and knowledge gaps	Preserving legitimacy (ex-ante); Securing resources
Idea Implementation	6	E8 HQ's final validation of the execution	E9 Production of campaign material	S4 From Formal to Informal	Selective concealment	Bypassing barriers; Securing strategic autonomy
	7	E10 Airing of TV campaign	E11 HQ's post validation of the execution	S5 From Informal to Formal	Strategic use of time; Shared wins framing	Preserving legitimacy (ex-post)
	7	E11 HQ's post validation of the execution	E12 Airing of full campaign	S6 From Formal to Informal	Selective concealment; Exploitation of hierarchical and knowledge gaps	Bypassing barriers
	7	E12 Airing of full campaign	E13 Consumer evaluation research	S7 From Informal to Formal	Strategic use of time; Shared wins framing	Preserving legitimacy (ex-post)
	8	E13 Consumer evaluation research	E14 Financial & market evaluation analysis	S8 From Formal to Informal	Selective concealment	Strategic autonomy
	9	E14 Financial & market evaluation analysis	E14 Visit by HQ; presentation of results	S9 From Informal to Formal	Strategic use of time; Shared wins framing	Preserving legitimacy (ex-post)

Figure 1   Timeline of Main Events

Month	1	2	3	4	5	6	7	8	9-10	11-22
Phase	Preparation	Idea Generation			Idea Elaboration & Championing	Idea Implementation				

Events Known to HQ (Formal channel)

HQ formally initiates the creative project E2

HQ's final validation of the execution E8

HQ's post validation of the execution E11

Consumer evaluation research E13

Visit by HQ; presentation of results E15

(Second Wave)

S1 S2   S3 S4   S5 S6   S7 S8   S9

Events Hidden from HQ (Informal channel)

E1 SGM decides to initiate a new local campaign

E3 Agreement of creative objective with the ad agency

E4 Development of creative requirements

E5 Elicitation of customer insights

E6 Creation and validation of the core idea

E7 Elaboration and initial validation of the execution

E9 Production of campaign material

E10 Airing of TV campaign

E12 Airing of full campaign

E14 Financial and market evaluation analysis

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Figure 2   **Data Structure**

First-Order
Categories

Second-Order
Themes

Aggregate
Dimensions

- Partial communication of actions
- Actions revealed to selected stakeholders

Selected Actions Revealed

- Partial avoidance of communication
- Partial concealment of information

Selected Actions Hidden

Selective
Concealment

- Communication of time urgency
- Setting tight project deadlines

Use of Time Pressure
and Time Urgency

- Delayed communication of completed actions
- Temporary delay of planned actions

Use of Temporal Delays

Strategic Use
of Time

- Hierarchical positions unoccupied
- Recent senior-level appointments

Exploitation of
Senior-Level Role Gaps

- Lack of functional expertise
- Lack of in-depth understanding of market, processes, and norms

Exploitation of
Knowledge Gaps

Exploitation of
Hierarchical and
Knowledge Gaps

- Commission of market/business research
- Collection of financial performance data

Gathering Evidence of Wins

- Communication of positive results
- Creation of live experiences of success

Sharing & Experiencing Wins

Shared Wins
Framing

Figure 3   An Emergent Process Model of Channel Switching