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Advancing post-merger integration studies: A study of a persistent organizational routine and embeddedness in broader societal context

Abstract

Studies analyzing organizational routines in post-merger integration (PMI) studies at the micro level are almost nonexistent. To fill this research gap, the author performs a longitudinal exploratory case study of an admissions routine of an art college undergoing a merger with a larger university, drawing on advances in routine dynamics literature. The study enhances understanding of PMI challenges by depicting routines' internal dynamics, their incompatibility, and the role of broader context in shaping their performances post-merger. The findings trace resistance to PMI to routine incompatibility caused by the simultaneous presence of multiple understandings (ostensive aspects) for integration, generated by the quest for efficiency-based synergies and continuity within the university post-merger, and for preservation, inherited from the pre-merger era and the routine embeddedness within the local context. The findings shed new light on the post-merger integration–preservation dilemma by illustrating how the interplay of routine participants' agency and routine embeddedness within the organization and broader societal context constrains PMI, in spite of an intended full consolidation plan, as routine participants enact the routine in the emerging context.

Keywords Organizational routines; post-merger integration (PMI); mergers and acquisitions (M&S); routine incompatibility; multiple ostensive aspects; embeddedness; societal context; routine dynamics

Introduction

Mergers and acquisitions (M&A) are common organizational phenomena, despite the discouraging outcomes that often result. Beginning with the introduction of the process view in M&A studies (Jemison and Sitkin, 1986) and the appreciation of the critical role of post-merger integration (PMI) in mergers' successful implementation (Haspeslagh and Jemison, 1991), the past three decades of research have provided valuable insights on the fundamental tension of balancing integration and preservation forces post-merger (Graebner et al., 2017; Monin et al., 2013; Reus et al., 2016; Schweizer, 2005; Zollo and Singh, 2004). Complementary to the strategic and cultural fit perspectives, which analyze relatedness and complementarity of organizational resources, performances, and cultures pre-merger (Bauer and Matzler, 2014; Buono et al., 1985; Chatterjee, 2009), the process school has advanced our understanding of the integration–autonomy dilemma and how other organizational actors perceive and implement managers' structural decisions post-merger (Birkinshaw et al., 2000; Mirvis and Marks, 1992; Puranam et al., 2006; Schweizer, 2005; Vaara et al., 2012).

In their quest for successful implementation, the major challenge managers face post-merger is balancing the need for integration to transfer knowledge-based capabilities amid the merging institutions with the need for autonomy to preserve those valuable capabilities (Heimeriks et al., 2012; Paruchuri et al., 2006; Safavi and Håkanson, 2018). As a result, organizational and management research has extensively discussed striking the right balance between seeking efficiency-based synergies and complementarity value creation through integration, on the one hand, and disrupting knowledge-based routines, on the other (Bauer et al., 2016; Larsson and Finkelstein, 1999). In this stream of literature, although PMI has been observed in light of establishing new routines across previous organizational boundaries, organizational routines have been considered a black box and used as the foundational units of higher-order organizational capabilities (Heimeriks et al., 2012; Puranam et al., 2006; Zollo

and Singh, 2004). Therefore, studying PMI at the routine level of analysis from within – rather than leaving the black box intact – has been almost absent from empirical research. As a result, building theory about the internal dynamics of organizational routines’ resistance to PMI offers an opportunity to address an outstanding research gap. A routine-level analysis (Feldman and Pentland, 2003) can provide promising avenues to explicate the processual dynamics of PMI at the micro level, shedding new light on how and why integration succeeds or fails in consolidation and alignment of organizational routines. Hence, this article addresses the following research question: *How and why does an organizational routine resist PMI despite an intended full consolidation plan?*

Prior research shows that revealing the internal dynamics of routines provides a valuable theoretical lens for studying organizational change from within (Feldman, 2000; Pentland and Rueter, 1994) by tracing associations between actions in routines and situating actions within the local context (Feldman et al., 2016). Complementary to the dominant power and political perspectives, which researchers have adopted to explain resistance to change in PMI research at the level of individual organizational actors (Schweizer, 2005; Tienari et al., 2005; Tienari et al., 2003), as well as the cultural perspective, which explains PMI challenges associated with differing organizational norms and values (Vaara, 2003; Zaheer et al., 2003), the organizational routine framework adopted herein traces the origin of PMI resistance to organizational routines’ incompatibility. By building on the internal dynamics of organizational routines – that is, the recursive and mutually constitutive interactions between the performative aspects (the actions multiple actors take) and the ostensive aspects (the patterns those actions create and recreate over time) – this article shows that the micro-foundations of routines’ incompatibility stem from their embeddedness within the organization and broader “societal context” – that is, the immediate physical and social setting in which the organization is embedded. In so doing, this article complements the valuable explanations provided for PMI

challenges from top management's and organizational culture's perspectives by investigating the micro-level of routines and the origins of their potential incompatibility as the source of resistance.

This article takes the organizational routine as the unit of analysis (Pentland and Feldman, 2005) and focuses on its internal dynamics and embeddedness within the broader organizational and societal contexts (Howard-Grenville, 2005; Pyrko et al., 2019; Schatzki, 2001, 2005, 2006). I adopt a process lens (Langley, 1999; Langley et al., 2013) to trace the variations in the admissions routine of an art college (AC) in the process of merging with a larger university. The variations emerge from conflicting pre-merger routines and the need for uniformity in the merged entity to achieve synergistic effects. Differences in how students were taught and admitted to the independent institutions pre-merger made it extremely difficult to integrate the admissions routines. Thus, this context is relevant for studying how and why routines demonstrate high-level resistance to PMI changes.

Highlighting the simultaneous presence of opposing forces for integration (top-down imposed understandings) and for preservation (bottom-up embedded understandings), the findings suggest that the coexistence of incompatible multiple understandings (ostensive aspects) of integration, generated by the quest for efficiency-based synergies and continuity within the university post-merger, and of preservation, inherited from the pre-merger era and the routine embeddedness within the local context, precludes the integration of the admissions routines. This incompatibility causes the routine participants to eventually revert to two individual routines, as they enact the routine in practice, despite the temporary domination of top-down pressures for integration (consolidation forces) in shaping the routine performance in the immediate post-merger era. These findings underscore the roles of the interconnectedness of routines within the AC and the embeddedness of the AC's way of admitting students in the broader context of the art world and creative industries in creating

strong ostensive aspects that inevitably preconfigure the agentic power of the routine participants and eventually shape the routine performances post-merger. The findings hence advance our understanding of organizational routines' resistance to PMI changes.

Theoretical background

PMI: The integration–preservation dilemma

Process research in M&A has primarily investigated the significant role of PMI in mergers' implementation (Graebner et al., 2017; Haspeslagh and Jemison, 1991), such that most studies focus on the challenges of balancing integration and preservation forces post-merger (Monin et al., 2013; Reus et al., 2016; Schweizer, 2005; Vaara et al., 2012; Zollo and Singh, 2004). Complementary to the strategic and cultural fit perspectives analyzing relatedness and complementarity of organizational resources, performances, and cultures pre-merger (Buono et al., 1985; Chatterjee, 2009; Coff, 1999), the process school has primarily addressed the integration–autonomy dilemma and how managers' structural decisions unfold and, hence, affect organizational life post-merger (Mirvis and Marks, 1992; Schweizer, 2005; Vaara et al., 2012).

Adopting the process lens, I define PMI herein as “the multifaceted, dynamic process through which the acquirer and acquired organizations or their components are combined to form a new organization” (Graebner et al., 2017, p. 2). Haspeslagh and Jemison's (1991) seminal work takes the “symbiotic” approach to portray PMI as a multidimensional and multistage process in which a gradual transformation from full autonomy to full amalgamation results in the creation of a new, joint entity. Important in this definition is the emphasis on the dynamic nature of PMI: Although integration is duly planned in most M&A cases, the emerging results vary from full compliance to full resistance (Safavi and Omidvar, 2016), and can include serendipitous opportunities (Graebner, 2004) as well as unanticipated problems

(Vaara, 2003). Following this view, PMI studies have advanced our understanding through four main streams.

The first dominant stream of research focuses on how managers drive PMI strategically to enhance organizational competitiveness (e.g., Capron, 1999; Schweizer, 2005). Complementing the pre-merger “strategic fit” view, scholars in this stream have largely studied (1) how managerial decision making unfolds post-merger (i.e., how other organizational members perceive and conduct top-down structural designs) and (2) how the unfolding of those structural designs affects and is affected by organizational performance and integration/preservation forces post-merger. Schweizer (2005), for example, shows that the merged organization performs better when managers follow a preservation approach to the research and development department and fast integration in other functional areas. Studying a higher education merger, Safavi and Håkanson (2018) demonstrate that fast integration of administrative routines is possible, whereas the innovative, interdisciplinary combination of academic expertise, even when managers push it strongly, requires a much longer time and a preservation approach dominates in the immediate post-merger era.

Other researchers in this stream have studied the role of autonomy and power in PMI and why the acquirer may favor its own routines and resources regardless of quality, pushing an integration agenda in a one-way absorption approach (e.g., Reus et al., 2016). Sarala and Vaara (2010) study the extent to which the acquirer’s values dominate in the integration phase and when changes in the joint organization are based solely on the acquirer’s routines and practices, disregarding preservation of the acquired’s routines and practices irrespective of viability. Capron (1999) and Mirvis and Marks (1992) similarly show that the acquirers’ “sense of superiority” leads managers to assume that their procedures, systems, and routines are better than those of the acquired firms, resulting in forced integration and discounting complementarity value creation. Paruchuri et al. (2006) show that structural integration and

loss of the target's autonomy harm the socially embedded patenting routines for inventors, for whom the acquisition means loss of status. Their findings show that the productivity decline is greater when the organizational actors (inventors) are more socially embedded in the independent organization and their expertise diverges more from that of the acquirer.

The second dominant PMI research stream focuses more explicitly on the management of knowledge in PMI, highlighting the opportunities and risks associated with the integration processes in dealing with knowledge-based routines of merging organizations. While some researchers recognize the potential novel combination benefits of knowledge integration (Ahuja and Katila, 2001; Puranam and Srikanth, 2007) and study how integration of organizational operations promote knowledge transfer (Cording et al., 2008; Sarala and Vaara, 2010), others discuss the likely disruptive effects on the socially complex organizational routines and hence the importance of adopting a preservation strategy (Ranft and Lord, 2000, 2002). For example, Bresman et al.'s (1999) case study findings elucidate two knowledge transfer phases between acquirer and acquired: In the immediate years following the acquisition, the acquirer enforced a one-way knowledge "absorption" approach onto the acquired; however, in the longer term, the transfer of knowledge became more reciprocal as the two organizations started to shape a single community and followed a "symbiosis" approach (Haspeslagh and Jemison, 1991). Empson's (2001) study of three mergers across six firms shows that when professionals from merging entities have different levels of tacit knowledge, mistrust leads to failure to appreciate their joining partners' expertise, which in turn results in preservation of the status quo post-merger. Puranam et al. (2006), examining the impact of structural integration on the innovative productivity of the target, demonstrates that integration and disruption of knowledge-based routines can delay the introduction of new products post-acquisition, with longer delays observed among targets without existing products.

The third stream of research revolves mainly around the cultural issues that organizations experience in dealing with integration challenges post-merger. Scholars in this stream have called for research focusing on the cultural dynamics that develop during PMI to complement pre-merger “cultural fit” studies (e.g., Teerikangas and Very, 2006). In their study of R&D acquisitions, Birkinshaw et al. (2000), for instance, identify two phases for effective integration: “human integration” in the first phase, in which managers encourage cultural molding and mutual respect and maintain a relaxed approach on task integration (adopting a preservation approach), and stricter “task integration” in the second phase, usually after three to five years, to optimize performance (see also Bauer et al., 2016). Vaara et al. (2012) study operational integration decision making to achieve standardization and elimination of overlaps, showing that the differences in organizational cultures generate the impetus for “social conflict,” which slow PMI processes. The authors also contribute to the second stream by showing that national *and* organizational cultural differences positively affect knowledge transfer and, thus, drive integration post-merger (ibid). Vaara (2003), adopting a sensemaking perspective in a PMI study of Finnish and Swedish furniture companies, finds that integration is slowed by cultural confusion and ambiguity.

Finally, in the fourth stream, a smaller group of scholars have studied micro-level organizational behavior issues such as employee stress, job dissatisfaction, and perceived justice, as well as evolving cognitive processes post-merger (Clark et al., 2010). For instance, in their study of a merger between two large accounting firms, Greenwood et al. (1994) find that perceived variances in professional standards result in an increased level of frustration among employees, which impedes PMI. Ellis et al. (2009) study the effect of perceived justice in the acquisition of related, similar-sized firms and find that a higher level of perceived justice drives integration in the emerging context of the partnering institutions. Paruchuri and Eisenman’s (2012) investigation of how managers’ structural redesigns reshape innovation

activities post-merger shows that integration of innovation-related routines increases uncertainty and anxiety, leading to higher perceived value of confirmatory (as opposed to novel) knowledge and hampering organizational innovation processes.

Although PMI researchers in all these streams appreciate that integration occurs at organizational routine level in the quest for efficiency-based synergies and/or complementarity value creation (Bauer and Matzler, 2014; Larsson and Finkelstein, 1999), study of PMI micro-foundations at routine level of analysis is almost nonexistent. In the extant body of PMI research, organizational routines are simply black-boxed and used either interchangeably with, or as the foundation units of, organizational capabilities (Heimeriks et al., 2012; Puranam et al., 2006; Zollo and Singh, 2004). Thus, opening the black box and building theory about organizational routines' resistance to integration offers an opportunity to address a notable gap in PMI research. A routine-level analysis (Feldman and Pentland, 2003) provides promising opportunities to explain the processual dynamics of PMI at the micro level, which can improve understanding of how and why managers may succeed or fail in (1) balancing integration and preservation forces and, hence, (2) consolidation and alignment of organizational routines post-merger.

Organizational routine dynamics

Traditionally, organizational routines are viewed as stable and unchanging “things” designed purposefully by top-level managers and enacted rather mindlessly by routine participants (Nelson and Winter, 1982; Parmigiani and Howard-Grenville, 2011). As a result, routines provide stability and performance standardization across the organization while contributing to structural rigidity (Hannan and Freeman, 1984) and create organizations that are inert and more resistant to change (Huff et al., 1992). However, recent conceptualizations of routines as generative systems note that change, like stability, is an integral aspect of routine dynamics (Feldman, 2000; Feldman and Pentland, 2003). Generative routine scholars examine how

interactions between routine performances and the patterns they create result in stability and change of organizational routines from within.

Organizational routines are defined as “repetitive, recognizable patterns of interdependent actions, carried out by multiple actors” (Feldman and Pentland, 2003, p. 95). These generative systems are “created through the mutually constitutive and recursive interaction between the actions multiple actors take (the performative aspects) and the patterns these actions create and recreate over time (the ostensive aspects)” (Feldman and Orlikowski, 2011, p. 6). Performative aspects represent agency, autonomy, and deliberation in organizational actors’ repetitive enactments of routines, and structural features embody routines in principle enforcing the status quo; in other words, “the ostensive aspect of a routine embodies what we typically think of as the structure,” while “the performative aspect embodies the specific actions, by specific people, at specific times and places” that bring the routine to life (Feldman and Pentland, 2003, p. 94). The ostensive aspects of routines, shaped by pressures for stability and/or flexibility (Turner and Rindova, 2012), cognitive and motivational factors (Stiles et al., 2015), or conflicting organizational goals (Salvato and Rerup, 2018), have a relatively high level of tacitness and exist in the form of taken-for-granted norms or procedural knowledge (Cohen and Bacdayan, 1994; Feldman and Pentland, 2003). These performative and ostensive aspects of organizational routines have a recursive relationship in which the performative aspects (re)create the ostensive parts through everyday practice of the routine, while the ostensive aspects, in turn, enable or constrain performances (Pentland and Feldman, 2005).

On the one hand, the multiple actors who shape and carry out routines have diverse subjective understandings. Although the ostensive aspects conventionally represent the structured, principled side of routines, variation in understanding can be observed across routine participants, giving rise to multiple ostensive aspects of routines (Feldman and

Pentland, 2003). In their study of garbage collection routines, Turner and Rindova (2012), for example, show how organizational members concurrently create and maintain multiple ostensive patterns for stability and for flexibility to respond to simultaneous needs for consistency, from customers, and for change, from organizational work. Their research shows that even the most mundane routines (e.g., garbage collection) are instances of effortful accomplishments and, because multiple understandings/patterns of action are present, are subject to change as they are enacted (ibid).

On the other hand, organizational life is full of instances, like M&A, when higher-order changes (Bartunek and Moch, 1987) necessitate intensified modification of routines. In those instances, such as PMI, in which routines are consolidated, the multiplicity of understandings becomes especially evident when routine participants who belonged to different organizational settings are brought together to shape unified, convergent performances. Consequently, they bring their own understandings of conducting similar routines from differing contextual circumstances while working together on a common routine post-merger (Howard-Grenville, 2005; Jarzabkowski et al., 2012; Rerup and Feldman, 2011). Such instances provide valuable albeit complex situations for studying the presence of multiple understandings driving simultaneous integration and preservation of organizational routines post-merger.

Revealing the internal dynamics of routines thus provides a valuable theoretical lens for studying organizational change from within (Feldman, 2000; Feldman and Pentland, 2003; Pentland and Rueter, 1994) by tracing associations between actions in routines (interdependency of actions), situating those actions within the local context (embeddedness of actions), and examining their recursive relationship with the recognizable patterns those actions create and recreate over time (Feldman et al., 2016; Howard-Grenville et al., 2016). Rather than viewing routines as things that can be modified as though they are fully controlled by managers who purposefully design them in a top-down manner within the organization

(Nelson and Winter, 1982), the current study views routines as generative systems in which the organizational actors' understandings as well as the patterns of actions come into being through the daily enactments of the routines in the local context, emphasizing the agency of the routine participants (Feldman, 2000; Howard-Grenville, 2005). The organizational actors who mindfully enact the routine within the local context can deviate from the top-down prescribed versions if considered necessary (Feldman et al., 2016; Wright, 2019). Such a perspective questions designed changes and deliberate interventions by non-routine participants such as top-level managers and foregrounds emergent organizational change pointing "to the limits of changing organizational routines through deliberate, exogenous interventions, given that actors performing an organizational routine presumably have the ability and choice to deviate from the designed pattern of action" (Wenzel et al., 2020, p. 5). As a result, the routine dynamics framework enables tracing the origin of PMI resistance to the merging organizational routines' internal dynamics and incompatibility, which moves beyond the struggle between structure and agency in the unfolding of PMI that has dominated the extant literature; it suggests a lens to move from the structure/agency dualism to the duality of analyzing structure *and* agency within the internal dynamics of routines (performative aspects as actions highlighting routine participants' agentic role as the ultimate source of change or resistance, and ostensive aspects as embedded understandings or patterns of actions, preconditioning the routine participants' actions and their agency). This in turn enhances our understanding of PMI challenges by complementing the dominant power and political perspective adopted to explain resistance to change in PMI research at the level of top individual organizational actors (Schweizer, 2005; Tienari and Vaara, 2012; Tienari et al., 2005; Tienari et al., 2003), as well as the cultural perspective explaining PMI challenges associated with differing organizational norms and values (Vaara, 2003; Vaara et al., 2012; Zaheer et al., 2003).

PMI and organizational routines

Extant process research in M&A focuses to a great extent on the main challenge managers face post-merger (i.e., the integration–preservation dilemma) (Graebner et al., 2017; Zaheer et al., 2013). On the one hand, integration is required for (1) capability transfer in core, knowledge-based organizational routines and (2) achieving coordination benefits and synergies in noncore, administrative routines (Bresman et al., 1999; Haspeslagh and Jemison, 1991). These integration mechanisms sometimes entail establishing new routines to coordinate actions across the merging entities. On the other hand, the independent organizations need to preserve their routines, as consolidation of routines may disrupt the task environment and consequently destroy valuable capabilities (Graebner, 2004; Puranam et al., 2006; Puranam and Srikanth, 2007). The dominant view on dealing with this dilemma has been directly linked to the trade-off between the need for strategic interdependence versus the need for autonomy: The former necessitates a higher level of integration while the latter recommends a higher level of preservation (Haspeslagh and Jemison, 1991). The consensus in the literature suggests a hybrid approach in which firms integrate noncore administrative routines while preserving core and strategic routines in the immediate post-merger era (Rouzies et al., 2019; Safavi and Håkanson, 2018; Schweizer, 2005).

Although the process school has provided valuable insights regarding M&A processual dynamics (e.g., Angwin et al., 2015), our understanding of how organizational routines go through PMI processes remains limited. Studying micro-foundations at the routine level of analysis can shed new light on PMI processes. In the extant body of research, organizational routines are merely black-boxed as the unit of analysis or used as the foundation units of higher-order organizational capabilities (Puranam et al., 2006; Zollo and Singh, 2004). For example, Karim and Mitchell's (2000) study of path dependency in routines and product-line changes in U.S. health sector firms between 1983 and 1995 examines changes at the level of routines,

without looking inside them, to determine whether product lines present in 1983 were kept in the product portfolio in 1995. The authors find that the firms that participated in acquisition practices demonstrated higher levels of operational routine reconfiguration in their product lines (ibid). Heimeriks et al. (2012) adopt a capability perspective, considering routines as things that managers can mold and redesign with full control. Building on Nelson and Winter's (1982) idea of hierarchical organizational routines, the authors introduce the notion of "higher-order routines," defined as those routines that entail dynamism, which gives managers the ability to mold and reshape what the authors call "lower-order routines" in the merger process (Heimeriks et al., 2012; see also Zollo and Winter, 2002). According to their conceptualization, managers use mindful enactments of higher-order routines to purposefully design and mold lower-order routines, which are then enacted by routine participants mindlessly in the merger process, allotting agency only to managers as higher-order-routine participants (Wenzel et al., 2020).

Currently, PMI studies tracing associations between actions in routines and situating those actions within the local context are sparse. Safavi and Omidvar (2016), in their analysis of divergent responses by two organizational routines undergoing the same merger initiatives, show that the positions routine participants take within the broader organizational field post-merger significantly affect their approach to PMI. Their findings demonstrate why the symbolic capital (Bourdieu, 1977) of some central routine participants can (or cannot) be mobilized in the new organizational context post-merger and why some routine participants can (or cannot) exercise their agency during PMI implementation. This in turn defines whether they are able to resist or must comply with the imposed changes to the studied routines (Safavi and Omidvar, 2016). Rouzies et al.'s (2019) post-acquisition integration study of a Norwegian firm acquired by a French multinational, in which both simultaneously faced a drop in demand due to the global economic crisis, shows that post-acquisition integration is embedded in a

network of coevolving routines. Their findings acknowledge the interconnectedness of organizational routines as well as the role of broader organizational and societal contexts in how PMI unfolds (ibid).

Considering the important roles of interacting parts of routines in how routine participants respond to imposed changes in the unfolding of PMI, and to advance M&A process research focusing on internal routine dynamics (Angwin et al., 2015; Rouzies et al., 2019; Safavi and Omidvar, 2016), my focus herein is inside the black box of routines, their connection with other routines, and their embeddedness in the local context. Hence, I take organizational routine as my unit of analysis (Pentland and Feldman, 2005) and ask *how and why an organizational routine resists PMI despite an intended full consolidation*. I focus on organizational routines' internal dynamics and embeddedness in the broader organizational and societal contexts (Howard-Grenville, 2005; Pyrko et al., 2019; Schatzki, 2001, 2005, 2006), tracing the variations in the admissions routine of an art college in the PMI processes of merging with a larger university. The variations emerge from incompatible extant routines pre-merger and the need for uniformity in the merged entity in pursuit of efficiency-based synergies. Differences in how students were taught and admitted to the institutions pre-merger made it difficult to merge the admissions routines. Thus, this context is relevant for the study of how and why routines demonstrate high-level resistance to PMI.

Methods

Case selection

I opted to use an explorative, phenomenon-driven case study featuring a major organizational restructuring process (Van de Ven and Sminia, 2012) of an art college (AC) undergoing a merger with a larger university in close geographical proximity. High-level organizational changes such as M&A disrupt the steady state of organizational life, leading to change, flexibility, and adaptability of usually taken-for-granted routines (Bartunek and Moch, 1987).

Past research has shown that these changes are associated with disruptions in routines' performances (Brauer and Laamanen, 2014; Turner and Rindova, 2012). I chose this case because such disruptions provide a natural experiment for studying PMI dynamics in a reflective inquiry, in that they involve a problematic situation in which organizational actors cannot just act habitually and the experience of dissonance necessitates coping with related circumstances (Chia and Holt, 2006). Hence, I believe that the academic merger is a revelatory case that can improve our understanding of PMI processes at the micro level of organizational routines.

Empirical context

The two institutions had a history of successful collaborations in offering various joint programs, so a merger proposal was offered in 2010 to achieve efficiency-based synergies and higher level of complementarity value creation between the two organizations (cf. Bauer and Matzler, 2014) and was approved a year after by the parliament. The new AC was opened in academic year 2011–2012 within the university structure (as a subunit of the College of Humanities and Social Science [CHSS]). The merger plan included elimination of parallel processes and centralization of key administrative routines of the AC within the university structure for cost savings; incorporation of new systems and procedures suitable for the customized needs of the AC; integrating the information systems of the two institutions; and transferring AC staff and student records into the university systems. During my fieldwork (21 months starting before the merger took place and ending after the merger was in effect), organizational members identified the merger as an exogenous shock to the AC's administrative routines and in particular their admissions routine, which became inductively the unit of analysis.

Prior to the merger, the AC was well known for its pedagogic methods in disciplines including art, design, architecture, and landscape architecture. These areas are concerned

mainly with tacit, experiential, and embodied forms of knowledge gained through and understood by practice in studio-based environments. As a result, the AC had developed bespoke approaches, systems, and structures to support these unique aspects of its education provision, ensuring that the distinctive culture of an AC education was nurtured and allowed to thrive. In contrast, the university tended to take a more theoretically informed academic approach in the CHSS, as is common in mainstream European education institutions. Although the original plan was to incorporate new systems and procedures suitable for the customized model of the AC within the CHSS, the university had to centralize administrative processes as much and as quickly as possible to reduce unnecessary task duplication.

Accomplishing the merger therefore required the AC to consolidate most of its administrative activities with the university's central services to achieve economies of scale. For most administrative tasks (e.g., human resource management [HRM], student record keeping), the administration was quite similar in the two organizations, though the university procedures appeared to be more standard in the field. For example, a high-level manager from the university described the HRM processes in the AC as “weird,” “idiosyncratic,” “random,” and “nonstandard”:

(d.1) Their HR procedures seemed to be a bit weird. So knowing who they were employing as their “sessional staff,” all this last summer we were trying to find who they were, what contracts they are on, in order to put them on to our [university] HR system ... no address, no record of how many hours they had worked, no record of what the contract was, the level they were on was entirely idiosyncratic ... I'm not suggesting that it was fraudulent, but it was just really nonstandard. They knew what they wanted to achieve and that seems perfectly valid. But instead of having a proper framework, it was just random. (In.14/1/U)¹

Hence, in most administrative areas, the AC administrators adopted the university's more “standard” procedures through centralization. However, for some administrative tasks more directly interconnected with AC students and academic faculty, the process and expectations

¹ I used the following abbreviations to triangulate the data sources: Informant Number(In.)/Interview Number(No.)/from University or College(U/C). Note the numbers are derived from the chronological order of the interviews, not the order in Table 1.

were substantially different. This was particularly evident for my unit of analysis, the admissions routine.

The admissions routines

The overall application process and admissions routine in the university were straightforward, based on academic records and written documents such as academic grades, curriculum vitae, cover letters, research proposals, and reference letters (see Figure 1), with very little academic faculty involvement. In contrast, the AC admissions process prior to the merger relied heavily on academic faculty assessments. It was more interactive, including interviews with shortlisted candidates. The process was based on both students' academic attainments and their art portfolio. The admissions office evaluated academic attainment details, and the academic faculty evaluated the portfolios:

(g.1) We would split the process between the academic registry [administrative staff] and the schools [academics within the AC] would assess the portfolios independently. Then when it came to the next stage that we were going to invite some students to come for an interview, they would then need to bring a bigger, more detailed portfolio, which would then go through an assessment again [by academic faculty]. So, before any offers were ever made, all of these processes were lined up, and there's an algorithm that worked out whether the students would be able to be accepted or not. And that took into account things like weighting participation, and therefore, because there was an assessment process built into that, the academic staff were quite heavily involved at certain periods. (In.5/1/C)

Insert Figure 1 about here

Despite the obviously different admission processes, on the day of the merger, the university required that all processes related to the AC's admissions routine be stopped, and the admissions routine centralized into the university's system. This clash of admissions routines as well as the clash between various understandings among the routine participants created difficulties in conducting the routine in the AC. As a result, the AC resorted to temporarily managing admissions manually within the university's central system, and after four months, it disintegrated the routine and relocated the admissions office permanently back

to the AC (see Figure 2). This failed integration attempt provides a case that sheds light on PMI processes at the micro level of organizational routines by offering the opportunity to theorize about the resistance to integrating two routines designed to meet the same admission goals (i.e., admitting the highest-quality students into their respective institutions).

Insert Figure 2 about here

Data collection

To examine the admissions routine in the AC post-merger, I collected longitudinal qualitative data over 21 months. In this exploratory case-based research, I adopted a grounded theory approach (Strauss and Corbin, 1990) and used a triangulation of 38 in-depth interviews, 21 months of non-participant observation (pre- and post-merger), and an extensive primary and secondary document analysis covering over 5,000 pages of information. Following other qualitative studies that adopt a grounded theory approach (Clark et al., 2010; Gioia et al., 2012; O'Reilly et al., 2012), I triangulated various data sources and data collection methods to better understand “the descriptive properties of the studies scene and the member interpretations of what stands behind those properties” (Van Maanen, 1979, p. 541) in constructing my first-order concepts about PMI dynamics. I also analyzed informant accounts from different hierarchical levels, including academic faculty, administrative staff, students, and mid- and top-level managers from both organizations, to capture multiple views on how organizational actors interpret and balance the pressures for consistency (preservation) and change (integration) in the PMI process.

Insert Table 1 about here

Interviews. Following other qualitative researchers studying organizational change processes (Clark et al., 2010; Gioia and Chittipeddi, 1991), my primary method of data collection was interviewing. Given my interest in capturing the first-order concepts that “are relevant to the human organizational experience in terms that are adequate at the level of meaning of the people leaving that experience” (Gioia et al., 2012, p. 16), I conducted 38 in-depth interviews with 28 informants at various organizational levels (see Table 1). The interviews lasted from 30 minutes to two hours, with an average of one hour. All but two interviews were recorded and transcribed verbatim. Initial interviews included broad questions that helped establish a big picture of the merger and the administrative routines in the two institutions (familiarization stage), while the second round of interviews was more structured and focused, targeting the main challenges and the reasons they were so difficult to navigate in centralizing the AC admissions routine. At this stage, the interview questions probed topics such as the interviewees’ day-to-day activities before and after the merger, the changes in their perception of conducting relevant admissions routines, the most problematic areas in the integration processes, and why these areas were so difficult. The third phase of interviews tracked the integration process closely (Langley, 1999; Strauss and Corbin, 1990), probing issues such as problems associated with the centralization of the AC admissions routine, the informants’ perception of integration forces, and their understanding of different pressures for preservation of the old AC admissions routine.

Observations and secondary documents. In addition to the interview data, I had the opportunity to attend the meetings of the merger integration working groups (pre- and post-merger) and to observe the restructuring of the admissions routine for over 18 months post-merger. I also analyzed the minutes of all merger integration working group meetings, public merger documentation, and relevant published news, articles, and university bulletins, encompassing approximately 5,000 pages of information. These additional data allowed me to triangulate and

supplement the transcribed interview data (Van Maanen, 1979), to reach theoretical saturation (O'Reilly et al., 2012; Strauss and Corbin, 1990), and to build a richer narrative case story (Langley, 1999).

Data analysis

My analysis included four stages. I started the coding processes by writing a thick story of the restructuring of the AC's admissions routine post-merger (Langley, 1999). This stage helped me understand the overall PMI process of the admissions routine and its contextual details so that I could establish a chronology for my subsequent analyses (see Figure 2 for a simplified extract demonstrating the admissions routine's integration/disintegration time line). In the second stage, I scrutinized this story based on how administrators were defining and conducting the admissions routine in the post-merger context. This stage helped me categorize specific aspects of the admissions routine that administrators were enacting in the evolving context in relation to, for example, centralizing tasks and using central computer systems, linking with interrelated administrative routines in the college and the university, working with academic faculty and students, and responding to top-down managerial concerns. Through this stage, I formed numerous first-order data categories that were ultimately reduced to the ten presented in my data structure (see Figure 3). In the third stage, considering my research question, I iteratively devised and revised a coding scheme. Specifically, I looked at how administrators balanced the abstract concepts of the admissions routine that resulted from pressure for both integration and disintegration/preservation, the emerging routine performances in the PMI era, and the implications of these iterations in (re)shaping the routine in principle. This resulted in the reduction and abstraction of first-order data categories into four second-order themes showing the simultaneous presence of multiple understandings (ostensive aspects), as well as two aggregate dimensions in the admissions routine post-merger: the "domination of imposed

understandings” (top-down integration drivers) and “(re)domination of embedded understandings” (bottom-up preservation drivers) (Gioia et al., 2012).

Insert Figure 3 about here

Finally, I analyzed the relationship between the performative and ostensive aspects to understand how the routine was performed after the merger. This analysis forms the structure of my theoretical model of PMI processes at the organizational routine level (see Figure 4). The analysis involved continuously validating the findings and proposed model by reflection and drawing on further insights from the key informants during the analysis. Building on these explanations, the merger time frame, and the recursive relationship between the dominant understandings (ostensive aspects) and the performances of the admissions routine post-merger (i.e., the initial integration and the subsequent disintegration), the next section presents the data in two main groups – domination of imposed understandings and (re)domination of embedded understandings – and four second-order themes.

Findings

Merger and domination of imposed understandings (top-down integration drivers)

I. Merger imperatives: absorption by the art college

From the early stages of my pre-merger data collection, it became clear that the university believed that the AC was expensive to run due to its high operating costs as well as high staff-to-student ratio. The merger dictated a strong need to achieve efficiency and economies of scale by reducing/eliminating parallel tasks in the AC, including the admissions routine. To do so, the university decided to centralize admissions processes and move previously local AC administrators to the university’s central admissions offices. Because the AC was much smaller

than the university, university decision makers opted to centralize the AC's admissions into the university's central admissions structure:

(a.1) It wasn't a two-way process: it wasn't what did the university do well and what the college do well; that wasn't the approach. It was: we are the university, we are this size, we can't adopt your policies, procedures, systems, etc.; we are merging, and the scales dictate changes. (In.3/2/C)

According to the informants, achieving efficiency and economies of scale in administrative routines depended mostly on the AC adopting the university's information technology system to centralize tasks. Here, the distributed computer systems and the codified understandings embedded in them helped guarantee consistency in actual administrative routines to achieve efficiency and economies of scale university-wide. To align the AC admissions processes with those of the university, technological interim arrangements were made (discussed in detail later) and training on the use of new computer systems was planned. A high-level manager in the university's admissions office predicted AC staff would eventually accept using the university's system:

(b.1) We have many members of staff [from the AC] who are coming in to see our student system for the first time and it is very daunting. And they have been used to one system, which was partly electronic, partly paper, coming to a system which is mainly electronic, and it is completely different and as we know it's not totally intuitive the way it works ... They would say this [our student system] is much easier. (In.4/2/U)

However, the AC administrative staff did not view adopting the university system as progress. Facing difficulties in responding to the academic faculty members' and students' daily needs and expectations within the new system from the early days in the PMI period, the AC admissions team found the university's system overwhelming and the disposal of the AC system, primarily due to its smaller scale, a waste of a great opportunity for sustaining excellence in the college:

(a.2) There have been problems with admissions and matriculation at the new art college. I think that's disappointing because the art college had a very, very good system and it was recognized throughout the country. So, these kinds of things were disappointing, that there were aspects of really good practices that impacted directly on students that weren't kind of picked up on because of the much smaller scale. (In.17/1/C)

Despite the alleged superiority of the old AC computer systems, the AC admissions team had to start using the university system for future admissions processing within the university's central admissions office starting on the day of the merger. To leverage the university-wide information systems, the merger dictated the changes in the admissions routine's performances in the AC. For example, there was a strong need to keep the routine within the CHSS admissions office largely as an administrative process to improve efficiency in dealing with a predicted increase in applications "in a shorter period of time in the coming years" (b.2)(In.14/1/U). These integration drivers (pressures from the substantial size difference as well as pressures to achieve efficiency and economies of scale through centralization of tasks and use of university's central computer system), and subsequent changes in the performances of the routine, correspond to the domination of merger imperatives (imposed understandings) in shaping the course of action in the new AC following the merger (labeled the "merger imperatives: absorption by art college" in the second-order themes in Figure 3). Table 2 provides further empirical evidence for the emerging data categories and interpretive codes in Figure 3.

Insert Table 2 about here

II. The AC's assimilation of university-wide coalescing understandings

From the university's point of view, the existing central rules and procedures for the admissions routine (linked with other university routines, e.g., quality assurance, registration, budget allocation) work as an umbrella concept for the institution's subunits (three colleges and 21 schools within the colleges). Thus, the subunits can have slightly divergent interpretations of administrative routines and can perform their daily routines in marginally different ways to meet their unique needs.

However, despite this local autonomy and some degree of divergence, the individual units were all subject to their overarching colleges to ensure a degree of consistency in what the interviewees and the merger documents referred to as “process excellence,” emphasizing efficiency, accountability, and rigorous quality control. As a result, the AC admissions procedures and rules needed to comply largely with those of the university, as a manager from the CHSS postgraduate office explained:

(c.1) Here in the [CHSS] postgraduate office, we help to set the quality assurance levels across the schools; we also link very carefully and closely with the central part of the university and the other colleges to make sure that we are all doing things largely meeting the same directives, the same policies, and where there is a degree of interpretation of policies and procedures, there is also a degree of consistency ... We sing from the same hymn sheet, but we may have different voices in the choir. (In.10/1/U)

Another manager at the CHSS admissions office explained the need for change in the AC despite appreciating the differences:

(c.2) It is this balance between making sure that we are all doing the right sort of things or at least meeting the right sort of outcomes in the right sort of way without saying, hey, this is necessarily a one size fits all ... We are actually doing things in the best way that suits the school’s needs while still meeting the university’s requirements.... [It] is essential that we tell the new art college how they need to adapt their old processes and adopt our processes. (In.18/1/U)

As discussed in the “Empirical Context” section (d.1)(In.14/1/U), the university viewed its own procedures as “standard” and many of the AC processes as “random,” and “non-standard,” which needed to be adapted. As a result, there were two levels of pressure for integration in the university structure at the top of the school level (the AC sits at the school level in the university structure): the relevant college and the university. Also, the continuity and interconnectedness of routines in the university necessitated change in the admissions routine procedures and performances in the AC as a subunit of the CHSS. For example, a staged admissions routine was the norm in the AC, but the CHSS pushed for quicker and earlier admissions decisions because they would “feed into other university routines such as registration, accommodation allocation, planning welcome events, and upcoming examinations” (e.1)(In.4/2/U). These pressures for integration (labeled “assimilation of

university-wide coalescing understandings by art college” in the second-order themes; see also Table 2, data categories c, d, and e), created by the need for unification of rules and procedures within the university and standardization of AC processes post-merger, as well as interconnections of routines and continuity within the university, dictated the changes in the performances of the AC admissions routine from the first post-merger day.

Summary: domination of top-down imposed integration drivers

These integration forces and subsequent changes in the performance of the admissions routine correspond to the domination of the imposed (top-down) understandings in shaping the course of action in the AC’s admissions routine post-merger. The first two groups of emergent second-order themes form the first overarching theme: domination of imposed understandings, or top-down integration drivers. It follows on from the top-down managerial willingness to integrate the new AC admissions routine to achieve efficiency and economies of scale, as well as the unification and connection of other “good practices” in the administration of the AC admissions routine within the CHSS and the university. The authorities rationalized the one-way integration by noting not only the size difference between the AC and the university but also how pre-merger negotiations between the university and the AC played out. The project manager revealed an instance of justification for the AC adopting the university’s way in a pre-merger interview:

Now, we are literally just looking at it and saying this [the AC admissions process] looks really exciting, so we want to say this is something we could possibly adopt in the university [but in the future]. And we’ve got to think how can we do it literally and how much can we use it? Does that require us to change some of the policies in the university? And some of the policy documents may refer to sending things out in a certain way and getting signatures and that sort of things. (In.20/1/U)

Rationalized considerations created the impetus for the domination of imposed integration understandings (ostensive aspects) in the AC admissions routine, resulting in PMI. All processes relating to the old AC’s admissions routine stopped, and the routine was centralized into the university’s system. In other words, from the first post-merger day, the

admissions routine performances started (1) to be shaped by the imposed, top-down understandings and (2) to modify the embedded, bottom-up understandings (ostensive aspects) of the routine over time.

PMI and (re)domination of embedded understandings (bottom-up preservation drivers)

III. Unfolding of embedded art college understandings

Although starting immediately at the merger date, the AC's performance of the routine started to be formed by the top-down managerial understandings, shortly after the merger, the university began to notice the need for customization and modification of the admissions processes related to the AC. The AC admissions routine participants needed to conduct most of their tasks manually and in parallel with the university systems and procedures in order to be able to cope with the post-merger AC's demands. The scenarios informants provided highlight the conflicts between how the university and the AC conducted the admissions routine pre-merger. For example, consider the portfolio-based application process for students in the AC, as explained by a high-level manager in the CHSS postgraduate office:

One example was the means by which portfolios are given to us. Digitally nowadays they can be up to 20MB. The university's electronic application system does not accept it; 2MB is the absolute maximum. The art college had what they called the mini-portfolio system. When somebody uploads an electronic copy of their portfolio, that is available for everyone to see ... It is there electronically, and this is the way actually people have got used to operating. This is bread and butter for them. So we had to say: well, we know that we cannot use the mini-portfolio system because the resource on the IT side is not there, but there are commercial things out there, like Dropbox where you just upload something, a whole bunch of data, you can get 2 GB for free ... And we say to the students, 'When you apply, put it onto Dropbox, put the link in with your application and that is it.' It triggered us to think we may not be able to adopt exactly what they do, but we can do something that maybe has the same outcome. (In.6/1/U)

As a result, the university organized an interim arrangement in the centralized admissions routine to cope with the shortcoming of the university central systems. However, larger issues emerged related to the necessary flexibility that surrounds the portfolio-based admissions routine in the AC and its connection with academic faculty and other organizational routines. As mentioned previously, the AC admissions routine was based on the ethos of practice-based disciplines in contemporary art and its pedagogic methods. Flexibility in admissions seems

necessary in these areas because they are speculative and self-reflective, and reliance on academic attainments alone would not provide the “correct base” for judgment in admitting students:

(f.1) The majority of times, when you do an overview assessment [portfolio and academic attainment], it would color the best of both; they would still have to have X number of As, Bs, and high scores in their academic and portfolio. But there was an allowance made every year for students who had exceptional portfolios, but hadn't all academic qualifications, there was another sort of test built in to allow students to come in under a weighting access. Because in art colleges, a high percentage of people have got various forms of learning difficulties or very, very high levels of dyslexia. And therefore, they could be incredibly talented and they don't particularly perform well in written [tests]. So, it's quite a complicated process to someone that is not familiar with it. When you are familiar with it, it makes some logical sense if you know and understand the pedagogy surrounding how assessment in art and design works. To cut a long story short, that's where they're having a lot of problems just now in trying to align the admissions for the college of art into the university system. (In.23/1/C)

The connections between the admissions routine, the academic faculty, and other routines within the AC made central management of the admissions routine even more complicated. As explained in the “Empirical Context” section (g.1)(In.5/1/C), the AC's admissions routine necessitates heavy involvement of the academic faculty, who assess the students' portfolio in tandem with the admissions office assessment of academic attainments. Another informant from the AC's admissions office highlighted the connection between the admissions routine and assessment routines in the AC, as well as the resulting difficulty in changing one of the two:

(h.1) Assessment starts at the point of admissions. That's different in the mainstream subjects, where you will be admitted, and you will get to see the first exam in Dec/Jan that would be the first assessment. Whereas if you are coming into an art or design subject, the first assessment was taking place was of your portfolio, and that's an ongoing assessment and leads up into your next assessment. So, the assessment processes are very different as linked back to admissions. (In.17/1/C)

These preservation/disintegration drivers (flexible nature of AC admissions, involvement of academic faculty, and interconnection with other organizational routines in AC) correspond to the “unfolding of embedded art college understandings” in modifying the course of action in performing the new admissions routine in the PMI era (Figure 3). These bottom-up forces demanded consistency with pre-merger performances in conducting the admissions routine in

the new AC despite the centralization of the routine within the university system post-merger (see also Table 2, data categories f, g, and h). The (re) domination of these forces resulted in the disintegration of the admissions routines, as discussed in the “Summary: (Re)domination of Bottom-Up Embedded Preservation Drivers” section.

IV. Unfolding of embedded creative industries’ understandings

Following the consolidation plan, the AC was unable to respond to the staff and prospective students’ daily needs related to the admissions routine, and the university was threatened with losing the AC’s excellence, status, and prestige. Soon after the centralization of the admissions routine, various groups of academics, administrators, and managers from the AC and university managers engaged in a series of negotiations aimed at finding solutions to the AC’s customized needs for the admissions routine. Two AC staff members highlighted the importance of preserving the AC’s admissions routine in two follow-up interviews after one group meeting. The first emphasized the importance of harmonizing with the rest of the AC in performing admissions, highlighting the importance of legitimization within the art and design world for the AC to remain respected and even functional:

(i.1) I don’t know how else to do the admissions, because then we wouldn’t be able to sync with the rest of the art and design sector. You know, they can’t afford to do that, because the whole purpose of the merger is to build on that [AC] success, not to unpick it. (In.23/1/C)

The second stressed that implementing any other kind of admissions routine will result in a significant negative impact on attracting the “best art students,” and hence losing the competitiveness of the AC:

(i.2) It will be still the art college academic staff that will assess the portfolios; there is no way around it in a creative industry. Because it’s clearly linked with other practices we do in the art and design, things like continuity of fair assessment, or being aligned with other art colleges. We cannot afford any other kind of admitting students since we will lose the best students out there in the art and design fields. (In.25/1/C)

These narratives empirically demonstrate that within the process of performing a routine, an association exists between the level of the organizational routine and its broader societal

context. In the explored case, the normative side of the art and design world was strong enough to create understandings that could dominate and shape the performance of the admissions routine. Only the AC academic faculty possessed the expertise to understand the potential discrepancies between the applicants' academic attainment and creativity. The university did not have this understanding prior to the merger, which is strongly embedded in the broader art world:

(j.1) Simply put, the difference that we are concerned with here is between a big academic university and an art college understanding of creative works. And the big university, despite all the excellences in various subject fields, does not hold the necessary understanding or awareness of what is considered art and what is not. (In.27/1/C)

Although individuals (faculty and administrative staff) within the AC still took action with regard to admitting students, the understandings of the outcomes and how they relate to professional values was socially constructed in a much broader context. The dominance of these broadly accepted understandings made it almost impossible for a single AC to deviate, as they had to stay compatible when working with artists and students from other art colleges and schools around the country and world. I refer to this group of observations as “unfolding of embedded creative industries’ understandings” in the second-order themes (see also Table 2, data categories i and j). These pressures for consistency with pre-merger performances (need for legitimization within, and harmonizing with the broader art and design world, as well as the fact that AC academics were the artists/art specialists) drove a preservation approach and led to the (re)domination of the art world’s embedded understandings in shaping the course of action of admitting students in the AC post-merger. The result was the disintegration of the admissions routine only four months after its consolidation within the university admissions office, as discussed in the following section.

Summary: (re)domination of bottom-up embedded preservation drivers

These preservation forces and subsequent changes in the performance of the admissions routine correspond to the domination of the embedded (bottom-up) understandings in shaping the

course of action in the AC's admissions routine post-merger. These last two groups of my empirical observations (second-order themes) create the second overarching theme: (re)domination of embedded understandings, or bottom-up preservation drivers. It follows from the bottom-up (embedded) desires for adopting the old AC admissions routine to achieve consistency with other routines in the AC, as well as synchronization with the AC's broader societal setting. This group of forces shaped by the nexus of routines inside the AC, as well as the legitimization need within the art world and creative industries, was rationalized through post-merger conflicts between new performances and the anticipated excellence in the AC admissions. Because the university authorities decided to move all procedures as of August 1, 2011 (the merger date), many of the electronic systems were shut down at the end of July 2011. In the subsequent months (August–December), and in order to have no disruption to the AC's academic practices, the admissions staff had to work mainly manually and in parallel due to the ongoing internal conflicts and incompatibilities between the two routines:

Everything stopped on the first of August night; in fact, that didn't work, because on the first of August, it was immediately apparent that the new administration were getting themselves located, getting themselves sorted out, discussing with the new head of college what he wanted to structure. And in the meantime, the operation was still needing to run! So, we had to immediately agree that the admissions team had to go back to the college and continue to work for two months there. (In.15/1/C)

Justified by the fear of losing the AC's reputation (and hence a drop in student applications and admissions of high-quality students), the strong understandings (ostensive aspects) for continuation of old processes (re)dominated the admissions routine in the AC. The informants' narratives and the released document post-merger show that the higher-order authorities in the university decided to change the centralized administration concerning the AC admissions processes and to relocate it back to the AC four months after the merger date. A high-level manager from the university expressed frustration early on in the PMI process, and as soon as the signs of dissatisfaction were out, he called for reconsideration:

We need to understand what causes them [AC staff] grief, what it is that caused them to go around with long faces; maybe it's the way that we do our business in the university. Do we need to

explain it better? Do we need to explain the benefits to them better? Or do we need to understand from them that maybe their way of doing things was actually better than our traditional way of doing something? (In.6/1/U)

Data from one of the official meetings of the university court complemented this observation, revealing the relocation of some of the administrative tasks back into the AC and acceptance of a “multi-site delivery model” (official report on the meeting of the university court, released December 10, 2011). Consequently, the authorities made changes in the admissions routine performance, which (1) were shaped by (re)dominated embedded, bottom-up understandings and (2) led to the modification of the top-down managerial understandings (ostensive aspects) related to admitting art and design students to the AC within the university. These changes included immediate relocation of the AC admissions staff to their previous local offices and tasks, representing a near complete retreat from the full consolidation plan to full preservation of the AC admissions routine.

Discussion

The academic merger is a revelatory case that improves our understanding of PMI. As an early study that investigates the post-merger integration–preservation dilemma by looking inside the black box of organizational routines, this research offers complementary insights into the dominant power and political perspectives adopted to explain resistance to change in PMI research at the top level of managers (Schweizer, 2005; Tienari and Vaara, 2012; Tienari et al., 2005; Tienari et al., 2003), as well as the cultural perspectives explaining PMI challenges associated with differing organizational norms and values (Vaara, 2003; Vaara et al. 2012; Zaheer et al., 2003). The routine dynamics framework adopted herein allows us to trace the origin of PMI resistance to organizational routines’ incompatibility, their internal dynamics, and the routines’ embeddedness within organizational and broader societal settings. Extant literature on the integration–autonomy dilemma has neglected routine dynamics in the PMI processes; thus, this research advances our understanding of organizational routines’ resistance

to integration an important way. The findings show that the existence of divergent forces for integration and disintegration (preservation) gives rise to multiple understandings (ostensive aspects) in the enactment of the routine post-merger. The clashes between top-down and embedded understandings, as well as mindful enactment of the routine, highlight the agentic role of routine participants as the ultimate source of organizational change and resistance. The findings, simultaneously, show that their agentic power is “preconfigured” due to the embeddedness of the routine within local contexts (i.e., the organizational and broader societal contexts). This helps PMI research move beyond confinement to the structure/agency dualism in studying integration–autonomy dilemma by enabling the analysis of structure *and* agency within the internal dynamics of mundane organizational routines. As a result, this paper offers four key contributions to the extant body of PMI research.

First, it contributes to the strategy stream, specifically, autonomy and power in PMI, by highlighting that agentic power is not limited to top-level managers but is present in lower-level routine participants as well. The analysis reveals that the routine participants approach the admissions routine with multiple orientations, created by multiple pressures for change and consistency; while they may temporarily enact routines reflecting on top-down change imperatives, they eventually enact them habitually, reflecting on the bottom-up needs for consistency with past performances. This puts organizational routine participants’ agency at the forefront, as it shows that organizational routines are indeed created as they are performed and enacted mindfully by the routine participants in practice (not merely by preplanned, top-down managerial designs) (Howard-Grenville, 2005; Pentland and Feldman, 2008).

As a central element of practice theory, organizational life is an ongoing production and hence emerges through agents’ recurrent actions. Research has addressed the probable relation between the multiplicity of the ostensive aspects and the development of divergent understandings by routine participants with varied organizational roles (Feldman, 2000;

Feldman and Pentland, 2003; Pentland and Feldman, 2005, 2008), for example, in response to concurrent pressures for stability and change (Safavi and Omidvar, 2016; Turner and Rindova, 2012). The current study advances this understanding in its finding that in order to control the actual performances, management – crystallized here as the university authorities – feels the need to control the decisions made in the course of conducting a routine. Because of this top-down pressure for consolidation of actions, management would consider any variation from the designed routine resistance in the performances. In Feldman and Pentland’s (2003, p. 110) words, “this analysis might suggest that the ostensive aspect of a routine is aligned with managerial interests (dominance), while the performative aspect is aligned with the interests of labor (resistance).” For example, Zbaracki and Bergen’s (2010) longitudinal study of a price-adjustment routine shows that for smaller changes, routine participants mold the routine according to their needs through low-level negotiations without reassessing the routine in principle. However, for larger changes, the authors suggest that top-level structural designs in the form of ostensive aspects dominate, shape the performances, and call for rethinking the routine in principle. Their argument implies that more abstract, top-down ostensive aspects dominate in larger changes as upstream pressures from managers determine the course of action and overcome downstream resistance (ibid). The current merger study, in contrast, shows that even with large changes, downstream pressures may dominate eventually and shape the course of action. This finding implies that it is not the magnitude of change that defines the domination of top-down or bottom-up ostensive aspects but rather the interplay between those multiple patterns of actions and other facets of organizational life (e.g., embeddedness within a network of interrelated routines).

My research findings also suggest that the ostensive aspects can be aligned with different constituencies within (or even beyond) an organization, including managerial, institutional, or labor interests. As a result, the routine performance in practicing change might be aligned with

managerial (dominance/change in this model) or administrative (resistance/stabilization in the model) interests, depending on the domination of top-down pressures for change or bottom-up pressures for consistency in the daily recreation of the routine (Figure 4). In the current study, this was evident in that the top-down ostensive aspects dominated right after the merger but could not perpetuate the routine in the long run; the old administrative understandings of the admissions routine in the AC eventually dominated the strong top-down desire for change. Thus, the routine dynamics perspective gives us reason to rethink the extent to which organizational change can be managed by deliberate interventions. As a result, the practice-based understanding of organizational routines adopted herein draws attention to power dynamics (Safavi and Omidvar, 2016), resistance (Feldman, 2003), and balancing conflicting goals (Salvato and Rerup, 2018) at the organizational routine level as enablers and constraints of change, all of which have to date played a limited role in extant research on power and political studies in PMI.

Insert Figure 4 about here

Second, the analysis shows that the connections between the central routine and other organizational routines from the pre-merger era and, hence, its embeddedness within the independent organization, make the PMI more complicated and difficult to implement. In this case, despite the initial dominance of top-down integration forces (imposed understandings), the strong connection between the admissions routine and other routines and organizational actors in the AC made it difficult, if not impossible, to enforce the quick consolidation plan, which ultimately led to the (re)domination of the embedded understandings (bottom-up pressures for preservation) and disintegration of the routine. Routine dynamics research extrapolates a clear connection between embeddedness of a routine within an organization and change/stabilization of the routine performances (Howard-Grenville et al., 2016; Parmigiani

and Howard-Grenville, 2011; Rerup and Feldman, 2011). For example, Howard-Grenville (2005) explains how routine embeddedness within organizational context, as well as its interconnections with other organizational routines, constrain its changeability. Her study of a high-tech manufacturing company shows that the interactions between the agency of individual routine participants and the organizational context explain “why the actions of some individuals, but not others, can change routines” and “how actors and contexts shape both individual performances of routines and contribute to their persistence or change over time” (Howard-Grenville, 2005, p. 618).

Recent advances in PMI research have acknowledged the importance of embeddedness within the broader organizational context – where managerial decisions and PMI processes unfold – in integration outcomes. For example, Rouzies et al. (2019) theorize that PMI processes are embedded in a set of ongoing interconnected routines, adding complexity to the causal ambiguity of integration decisions and their outcomes. My findings extend this line of argument in PMI and provide new managerial insights. An organizational routine, like any social or organizational phenomenon, unfolds in a broader organizational bundle of routines and arrangements. Consequently, it is inseparable from both the occurrence of other organizational routines involved and their interwovenness with embedded arrangements (Schatzki, 2005). Therefore, changes in an organizational routine, as an alteration in any components of a bundle, necessitates changes in the continuity of others, which may prove impossible in some circumstances. An organizational routine cannot be carried out independently of other interrelated routines (Howard-Grenville, 2005), as they usually overlap and connect (Schatzki, 2002, 2006); therefore, the prime PMI challenge for managers is dealing with the change of a nexus of routines and their interconnections rather than an isolated routine. In my case study, although management was able to arrange an interim solution for the technological needs of the administrative routine, its connections with other organizational

actors (i.e., involvement of core academic faculty) as well as its embeddedness within the nexus of other organizational routines (i.e., interconnection with other core and strategic routines such as assessment in the AC), justified the ultimate (re)domination of embedded AC understandings in shaping the admissions routine performances post-merger.

Third, analysis of the findings elucidates that the degree to which a given organizational routine is embedded within its broader societal setting also significantly influences its changeability (Feldman and Pentland, 2003; Howard-Grenville, 2005; Pyrko et al., 2019). After the domination of imposed, top-down understandings in implementing the consolidation plan occurred, the AC admissions routine, which belongs to and synchronizes with the unique world of art and design, was unable to respond to staff and prospective students' demands, and the university was threatened with losing the AC's reputation and prestige. Thus, within the process of conducting an organizational routine, a strong association exists between the level of the individuals (the routine participants) and the collectivity to which the individuals belong at the broader societal level from which they achieve professional legitimacy (Pyrko et al., 2019). As a result, although actions are taken by individual agents in each iteration of the routine, understanding of their actions' outcomes and how they relate to ideals and values in the broader societal context constrain the routines' changeability (Schatzki, 2010). The domination of these broadly accepted understandings makes it almost impossible for a single AC to deviate and not comply with the broader landscapes of the profession spanning beyond organizational boundaries (Pyrko et al., 2019; Wenger, 1998). As explained in the findings, the AC academic faculty identify themselves as artistic workers within the art world and creative industries, such that their artistic work (e.g., the portfolio assessment of the AC admissions) is associated with the broader community and landscape of art and design professionals. Thus, the routine participants require legitimization not only at the level of the organization but also from the broader landscape of their professional practices (Pyrko et al., 2019). As a result, the

embeddedness of the admissions routine in creative industries “preconfigures” the free agents’ practical understanding and their will for changing the routine performances post-merger (Schatzki, 2002, 2005, 2006). In the observed case, the embeddedness inhibits change in the AC’s original admissions routine and precludes the university’s pressures for change to ultimately dominate, which explicates central routine participants’ (herein, the AC admissions team’s) willingness to approach the routine with an orientation to iterate past performances (Nicolini, 2013).

Here, the findings contribute to the cultural stream of PMI studies. Past research has shown how cultural challenges develop and are dealt with during PMI, and how those challenges affect post-merger integration (Bauer et al., 2016; Birkinshaw et al., 2000; Teerikangas and Very, 2006; Vaara, 2003; Zaheer et al., 2003). Vaara et al. (2012), for example, show that national cultural differences can act as integration facilitators as they decrease social conflict in the post-acquisition era, while Vaara (2003) shows that the differences in organizational cultures generate the impetus for social conflict slowing PMI processes. Birkinshaw et al. (2000) differentiate between cultural and task integration: While human integration is pursued as the first phase of PMI, in which managers encourage cultural molding, managers move to task integration usually after three to five years to optimize performances. The extant body of PMI cultural studies deals with norms and values at an abstract level and suffers from dualism in the integration of tasks and cultures; however, using routine dynamics provides a strong theoretical lens for explaining PMI challenges associated with differing organizational norms and values and cultural dynamics at daily organizational routine level. For example, Bertels et al. (2016) investigate the integration of a coveted routine with poor cultural fit in a Canadian oil company. The researchers found that integration in such cases involves participants to engage in additional cultural works in the enactment of the routine to compensate for the mismatches between emerging performances (informed by

established organizational values) and the espoused routine (Rerup and Feldman, 2011), rather than rejecting the routine outright (Bertels et al., 2016).

Culture has been used to explain lasting or hard-to-change behaviors embedded in the way things get done around here (Deal and Kennedy, 1982), but in this PMI stream, cultural integration challenges have been addressed separately from task integration. My findings demonstrate how the differences in norms, values, and ethos would unfold in the enactment of the routine, giving rise to multiple understandings in the post-merger era and opening up an avenue to study cultural molding together with task integration. In the observed case, while the dominant values in integration from the university managerial point of view were economic, the AC staff belonging to the world of art stressed the importance of the maintenance of AC customized practices and routines over efficiency and economies of scale. The clashes emerge in the form of drivers for integration and preservation/disintegration, and although the economic values dominate initially and in the immediate post-merger era, the art and design values embedded in the broader culture of creative industries, from which the admissions routine gains its legitimization, (re)dominate and shape the task integration and routine performance ultimately. These findings extend our understanding of clashes of values and norms crystallized in routine incompatibility rather than individual or organizational abstract beliefs and values. Drawing on routine dynamics, hence, opens new avenues for further research on cultural studies in PMI.

Fourth, and finally, the findings also further our knowledge of the role of interactions and connections in the creation of understandings of organizational routines and, hence, their impact on the implementation of integration plans post-merger. Past studies have maintained that a greater degree of interaction, connection, and communication between the merging entities during PMI could lead to a better coordination and superior performances (Bresman et al., 1999; Larsson and Finkelstein, 1999; Larsson and Lubatkin, 2001; Reus and Lamont,

2009). In addition, pre-merger strategic fit literature has highlighted the importance of having enough accurate knowledge about the target firms, especially in knowledge-intensive industries, and its impact on the success of merger implementation (Coff, 1999). The routine framework adopted herein extends this line of research at the micro level of analysis of PMI. In their analysis of rubbish collection routines, Turner and Rindova (2012, p. 43), for instance, found that “organizational members develop shared and mutual understandings of the routine through connections, whereas participants with limited or no connections appear to develop limited and divergent understandings because they rely on minimal cues.” Focusing on customers and their limited connections with the central routine, Turner and Rindova (2012, p. 42) assert that “the relative lack of connections appears to result in inflexible expectations of consistency.” My study extends their findings by demonstrating how participants with looser connections to, and interactions with, the central routine create peculiar understandings about the routine and its changeability. In my case study, top-level university managers with little or no connection with the AC’s admissions routine developed such understandings. This relative lack of connections on the part of top management resulted in the creation of unrealistic expectations of change (integration), which can cause the routine to significantly diverge from its prior enactments (Feldman and Pentland, 2003; Howard-Grenville, 2005). However, the improved connection and augmented interactions through post-merger negotiations helped modify those understandings towards a more realistic integration plan that embraced a higher level of preservation and lower level of consolidation than were initially envisaged. This finding highlights the importance of understanding the meaning of actions and implications of their cumulated patterns over time for the managers from the standpoint of individual organizational routine participants. This, in turn, helps managers better understand the enactment of organizational routines by core participants in the post-merger era as constitutive and the ultimate source of organizational change (Wenzel et al., 2020). For example, Bucher

and Langley (2016) provide an example of a case in which managers in surgical clinics provided “experiential spaces” to deviate from established routines so that employees can envision a possible new workable pattern of actions. Rather than planning to design new patterns of actions or replace the current routines with new ones with top-down structural design, managers should investigate more deeply how those patterns of actions are created over time and provide opportunities for deviation and piecemeal changes for strongly interconnected and embedded routines in order to arrive at better integration results in the long term.

The PMI literature tends to equate M&A not following managerial intentions with failure, implying that managers are supposed to know best. Consequently, employees not acting according to manager intentions are labeled as resistant. My findings suggest that embedded routines may actually be valuable in their original context. As they are difficult to perceive from the outside and ex ante, one could presume managers are not often fully aware of them within the merging organizations. Consequently, employees may actually know, or perhaps unwittingly behave, “best.” One can think of many instances in which erroneous synergy-seeking efforts could make matters worse if top managers persist in planned integration, and other instances in which a status quo at least saves important capabilities. That is, employees who act in accordance with locally embedded routines (rather than managerial intentions) may actually explain why even more M&A do not fail.

Conclusion

The process view in M&A studies has provided valuable insights on PMI procedures and their critical role in mergers’ successful implementation. However, much remains to be explored. In this research, I adopted organizational routines as my unit of analysis to explain resistance to change in PMI in a new way. Complementary to the power/political and cultural perspectives, the routine framework adopted herein asserts that the origin of resistance in PMI can be located in routines’ incompatibility, which originates from their internal dynamics and embeddedness

within organizational and broader societal contexts. Therefore, this paper furthers some important areas in PMI research. First, it enhances the power and political studies by highlighting the agentic role of routine participants in emerging organizational changes, underscoring the importance of daily organizational routine enactment as the ultimate source of organizational change. Second, the findings highlight that the strong pre-merger connections between the central routine and other organizational routines (i.e., embeddedness within organizational context) make the integration process more complicated and less likely to happen in the short term in the merged entity. Third, the study advances PMI theory by examining the effect of the broader societal context in change and resistance of organizational routines post-merger. The findings hence contribute to the PMI cultural studies by explicating that the existence of multiple routine understandings (ostensive aspects), resulting from varied organizational norms, values, and ethos embedded in broader organizational and societal contexts, significantly affect routines' changeability and PMI dynamics. The findings also highlight the important role of connections and interactions in creating a realistic understanding of routines' changeability in PMI.

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Table 1: Interviews and interviewees

	Organizational or Merger Project Role*	Organization (University [U] or College [C])	No. of Interviews	Duration (in minutes)	Mode**	Timing (Pre- or Post-Merger)
1	Project Manager	U	2	60/60	P/P	Pre/Post
2	Project Officer 1	U	2	120/—	P/E	Post/Post
3	Project Officer 2	C	2	60/105	P/P	Pre/Post
4	HR Manager	C	1	70	P	Post
5	Head of HR	U	1	60	P	Post
6	Head of HR	C	2	60/—	P/E	Post/Post
7	Head of Registry	U	1	70	P	Post
8	Head of Registry	C	1	70	P	Post
9	Head of Admissions	C	1	60	P	Post
10	Head of PG Office	U	2	75	P/E	Post
11	Head of UG Office	C and U	1	60	P	Post
12	Operating Officer	Ext. Temp. for C	1	60	P	Post
13	Principal	C	1	50	P	Post
14	College Registrar	U	1	70	P	Post
15	Head of Admin	C	1	70	P	Post
16	Dir. of Crp. Services	U	2	90/70	P/P	Post/Post
17	Admissions Admin	U	1	70	P	Post
18	Admissions Admin	C	2	60/—	P/E	Post/Post
19	HoS of Art	C	1	90	P	Post
20	HoS of Design	C	2	70/20	P/P	Post
21	HoS of Architecture	U	1	50	P	Post
22	Head of CHSS	U	1	60	P	Post
23	Academic faculty	C	2	80/—	P/E	Post/Post
24	Admin Staff	U	1	60	P	Post
25	Admin Staff	C	1	60	P	Post
26	Academic faculty	C	1	75	P	Post
27	Student 1	C	2	30/55	P	Pre/Post
28	Student 2	C	1	60	P	Post
Total			38	2,190		

* Abbreviations: human resources (HR), postgraduate (PG), undergraduate (UG) administration (admin), director (Dir.), corporate (Crp.), head of school (HoS)

** Abbreviations: personal interview (P) and email (E)

Table 2: Themes, data categories, and extra representative quotations

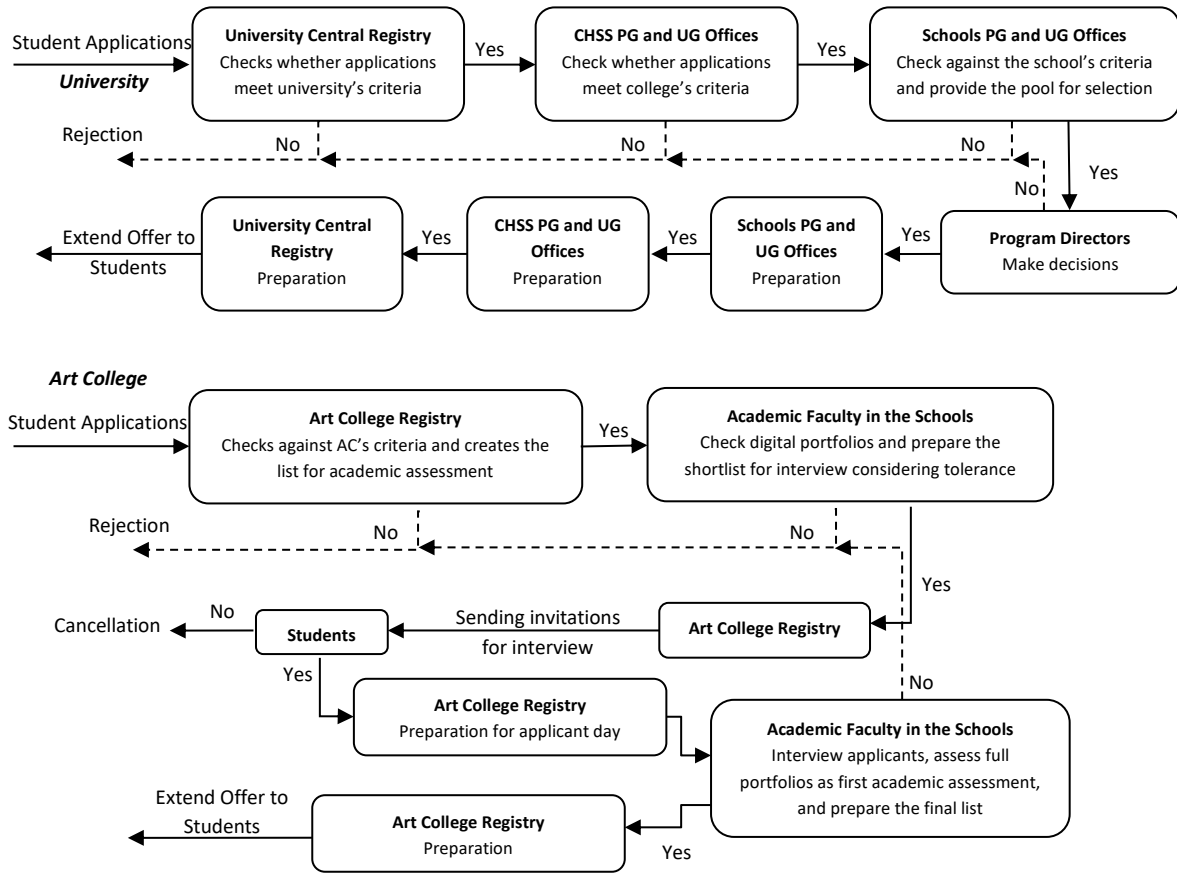
Second-Order Themes and First-Order Data Categories	Representative Quotations
<i>I. Merger Imperatives: Absorption by AC</i>	
a. The university is much bigger than the AC	(a.3) We can tell the art college colleagues how they can adapt their old [admissions] routines and adopt our processes. Of course, it needs training in terms of working with new systems and procedures to understand how to go about their daily business. We certainly have the expertise and been involved with various admissions here in this office given the immense size of this university. (In.8/1/U) (a.4) I think when you look at the size of the university and the size of the college, comparably they're miles apart. The college really has 300 staff; here you have 10,000. So if there are things that we've done well and there were some that we've done better than the university... but the point I'm trying to make is that it is easier for 300 people to change to the ways of 10,000 than it is for 10,000 to change to the ways of 300. (In.9/1/C)
b. We need to centralize tasks for economies of scale and efficiency	(b.3) Art colleges are expensive to run. So, in all sorts of areas which are attached to operational departments or core university support departments [e.g., student registry, admissions], you will get economies of scale in there; I think for some of the academic-related things, they won't be as noticeable as those; however, they would try to centralize whatever is possible. (In.6/1/U)
<i>II. Assimilation of University-wide Coalescing Understandings by AC</i>	
c. We need to apply unified overarching rules across the colleges and schools	(c.3) There has been a need for modification. I mean clearly we've got colleagues [from the AC admissions team] that are now coming in with some important differences in academic traditions and pedagogy, and so the whole university regulatory framework is hard to adjust, to accommodate the necessary and sensible difference that comes from what the school of design does, which is quite different than any of the existing departments in the university. (In.16/1/U)
d. The AC should "standardize" its procedures	(d.2) For example, at the university, we don't allow resits at PG level for courses that are failed: you pass or you fail them. Now the art college, they do allow resits. Now if you have resits, then what happens? Is that the student then, apart from anything else, the actual mechanics of when they do the resit and what is the effect on their total timeline on that resit, means that people exit with all sorts of different dates, and how do we record that on our systems so that everybody can look at the same thing and understand that each of these individual students are taking resits, what's happening. And in the long term, do we want to continue with this, or do we actually want to say: well no, that's something maybe was allowed before, sorry, that's not the way we do the things in the university. (In.8/1/U)
e. Routines are interconnected in the university and we need continuity	(e.2) My perception was a reticence that although there seems to be a PG research office, there wasn't a PG taught office, because PG taught and the undergraduates were linked very closely together in the old art college. Whereas we link the postgraduate taught and the postgraduate research together [in the university admissions processes]. (In.2/2/U)
<i>III. Unfolding of Embedded AC Understandings</i>	
f. The AC students' admissions need flexibility	(f.2) So I would think that it's just a learning curve for a couple of years, but I can't see that the fundamentals that underpinned the pedagogy for art and design would be taken away, because that's how you can't assess art and design in the way that you would assess law; you can't do it by a written exam. Although there's a written dissertation, you can't assess creativity in written [form]; so no, I don't think that [the admissions routine] would change. (In.11/1/C)
g. Academic faculty are heavily involved in the AC admissions process	(g.2) Over a period of years since I have been there, the academic staff have seen themselves more as educators and that's because there has been an awful lot of work done in the college about excellence in teaching and learning. Academics were engaged with the application processes from the very first day with students. I think there was some concern that that wouldn't be recognized in the university. I believe that the academics will ensure that that [the admissions routine] doesn't change! (In.7/1/C)
h. Admissions routine is interconnected with other routines in the AC	(h.2) I think change for any individual routine is quite a difficult thing! In higher education, and especially in art colleges I think, staff turnover is quite low, so [academic] staff tend to be there for a long time, and of course they are used to a particular set-up for conducting their research and teaching which makes the change [in the admissions routine] difficult. (In.13/1/C)
<i>IV. Unfolding of Embedded Creative Industries' Understandings</i>	

**Second-Order Themes and
First-Order Data Categories**

Representative Quotations

<p>i. The AC needs legitimization within, and harmonization with the art world to stay competitive/attract best students</p>	<p>(i.3) There was a sort of college roadshow, which was set up [as part of the admissions], I think, the day or two days before the final degree show had to be set in place! And these are nuances which are specific to the art colleges, and you couldn't necessarily expect the university to know about them ... that's not the problem; they could've asked. The problem is they do not understand how important the practice in this setting is. (In.19/1/C)</p>
<p>j. Only the AC academics (the artists), belonging to the art world, understand artworks</p>	<p>(j.2) I think what you are saying here is the conflict between a big academic university, taking on a subject which is very creative, and where they don't have the experience of the assessment of the creative side. (In.27/1/C)</p> <p>(j.3) There have been some problems identified very, very quickly. And particularly for the undergraduates, there's one of the senior staff who has moved over has been given that as part of his remit to manage the transition for admissions, because they can't afford for the numbers [of applications] to start dropping down because it was a very elite institution in the art world, and they can't afford to lose that sort of prestige. So, there are a lot of challenges I think here, and that will take a lot of care for management over a period of time, but there is someone who got an overview of all of that, and that is an art college person. (In.25/1/C)</p>

Figure 1: Admissions routine in the university and art college (before the merger)



Notes

1. Due to the complexity of the PhD application process, it is excluded from this model for simplification.
 2. Preparation refers to administrative practicalities necessary for incorporating students into the schools, the college, and the university and connecting to various divisions inside and outside the institutions (e.g. scholarship, accommodation allocation, induction, student ID).
- Abbreviations: PG = postgraduate; UG = undergraduate.

Figure 2: The admissions routine integration/disintegration timeline

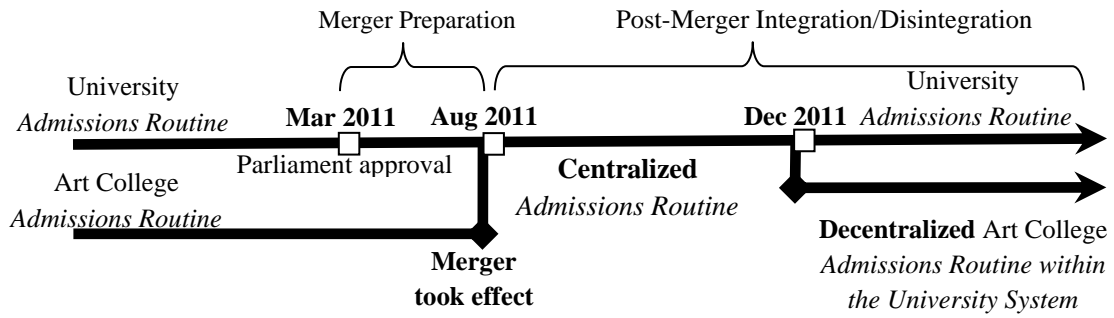


Figure 3: Data structure

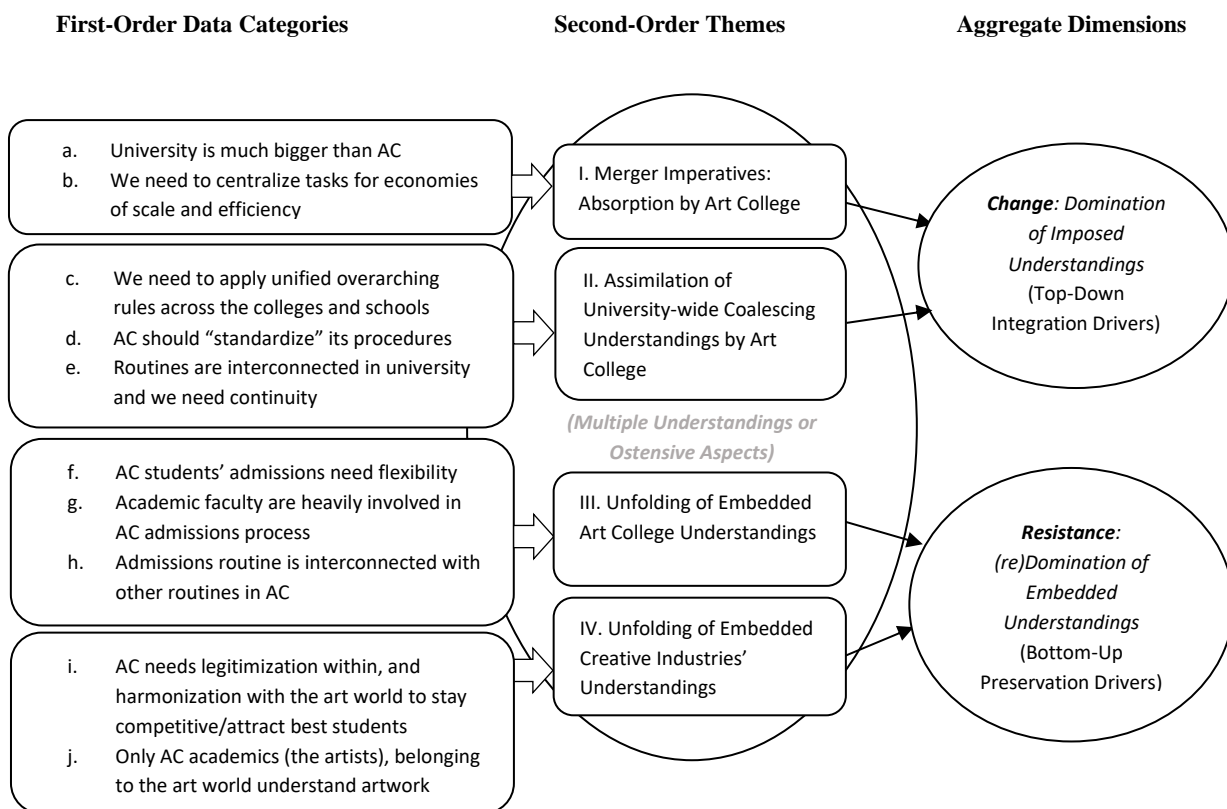


Figure 4: PMI processes at organizational routine level

