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**Citation:** Chung, D., Sandholtz, K. and Waisberg, I. (2019). The double-edged sword of jurisdictional entrenchment: Explaining HR professionals' failed strategic repositioning. *Organization Science*, doi: 10.1287/orsc.2019.1282

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## The double-edged sword of jurisdictional entrenchment: Explaining HR professionals' failed strategic repositioning

To protect themselves against deskilling and obsolescence, professionals must periodically revise their claims to authority and expertise. Although we understand these dynamics in the broader system of professions, we have a less-complete understanding of how this process unfolds in specific organizational contexts. Yet given the ubiquity of embedded professionals, this context is where jurisdictional shifts increasingly take place. Drawing on a comparative ethnographic study of HR professionals in two engineering firms, we introduce the concept of *jurisdictional entrenchment* to explain the challenges embedded professionals face when they attempt to redefine their jurisdiction. Jurisdictional entrenchment describes a condition in which embedded professionals have accumulated tasks, tactics, and expertise that enable them to make jurisdictional claims in an organization. We show how such entrenchment is a double-edged sword: instrumental to the ability of professionals to withstand challenges to their authority, but detrimental when expertise and skills devalued by the professionals remain in high demand by clients, thus preventing the professionals' shift to their aspirational jurisdiction. Overall, our study contributes to a better understanding of how embedded professionals renegotiate jurisdictional claims within the constraints of organizational employment.

HR filters a lot of stuff that employees bring to the table that I don't necessarily need to see . . . like where we had an employee complaining about something, you know. HR is, like, "We took care of it with one of your managers, and it's all been resolved." And I didn't even see it. Perfect – absolutely perfect. Love it! – *Technocorp vice president*

Criticized since the early 1980s for its administrative and compliance-oriented tendencies, the HR profession has been repeatedly admonished to play a more strategic role in organizations (Boudreau and Ramstad 2007, Tichy, Fombrun and Devanna 1982, Ulrich and Beatty 2001). Proponents argue that such a role offers HR practitioners a path to more highly valued and measurable contributions to organizational performance. Progress along this path has been slow, however (Lawler and Boudreau 2012, pp. 24-25). Even without a neighboring profession vying for HR's desired new tasks and responsibilities, HR has struggled to make the transition to a strategic role and remains the object of pundits' plans for transformation and reinvention (Cappelli 2015, Charan 2014, Hammonds 2005, Mundy 2012, Ulrich, Kryscynski, Brockbank and Ulrich 2017).

As puzzling as HR's occupational stasis is to practitioners, it raises an equally perplexing theoretical question: Why would an organizationally embedded profession fail to change its jurisdiction when no other occupational group is standing in its way? Recent studies have enhanced our understanding of how professionals in organizations defend jurisdictional claims, sometimes unsuccessfully, through negotiations with administrators, clients, and adjacent occupational groups (e.g., Bechky 2003a, DiBenigno 2017, Huising 2014, 2015). For example, we know that embedded professionals assert and protect their jurisdictional claims through ongoing interactions with competing occupational groups (Bechky 2003b, Bechky and Chung 2018), as well as through collective efforts to buffer their work from organizational interference, including from managers' attempts at standardization or deskilling (Child and Fulk 1982, Freidson 1984, Vallas 2006). Although these studies explain how embedded professionals maintain or defend jurisdictions, they leave unexplained how professionals proactively attempt, and possibly fail, to *shift* their jurisdiction to realize their professional aspirations while in the confines of organizational employment. If the central professional challenge has historically been the continual renewal of claims to exclusive expertise (Abbott 1988), we need to re-examine this challenge in specific organizational contexts (Anteby, Chan, and DiBenigno 2015).

In this article, we analyze the work of HR professionals in two comparable engineering firms (hereafter Digicorp and Technocorp). In Technocorp, we observed an attempted jurisdictional shift by HR professionals. This shift entailed reframing their expertise around an internal business consulting role and attempting to relinquish tasks associated with their traditional administrative and compliance roles. These moves, although prompted by an organizationally mandated budget cut, were conceived and implemented by the HR function's leaders, drawing on prevailing wisdom in the broader HR practitioner community (Boudreau and Ramstad 2007, Ulrich et al. 2009). In Digicorp, we did not observe any attempted jurisdictional shifts, but instead observed how HR professionals solved important problems through their expertise, their technique, and their working relationships with clients. An inductive analysis of how the attempted shift failed at Technocorp, in conjunction with an analysis of how HR professionals defended their traditional task domain in Digicorp, led to our theoretical insight, which centers on the concept of

*jurisdictional entrenchment*. In prior research, entrenchment has connoted resistance to modification as in Dane's (2010) notion of cognitive entrenchment. We extend this connotation by drawing on the word's common language definition: to surround with a trench, especially for defense. Jurisdictional entrenchment captures a condition in which embedded professionals have accumulated tasks, tactics, and expertise that enable them to defend their jurisdictional claims against adjacent groups, clients, and administrators in an organization. However, we show how this condition may constrain embedded professionals' ability to let go of unwanted tasks and take on higher-value work activities – in other words, to “get out of the trenches” to accomplish a jurisdictional shift.

Specifically, we show how, because Technocorp's HR professionals were unable to shed tasks associated with their existing expertise, relationships, and position in the organization, they were unable to redraw their task boundaries exclusively around their aspirational jurisdiction. Instead, they reluctantly performed old tasks, added some desired new tasks, and deliberately distanced themselves from a group of former internal clients (the employees) who no longer fit in their management-oriented jurisdiction. In contrast, HR professionals at Digicorp maintained their jurisdiction by drawing on their situated expertise, their skill in managing interpersonal issues, and their frequent interactions with line managers and employees.

Our study enhances our understanding of embedded professions in three ways. First, we introduce the concept of jurisdictional entrenchment as a condition that allows professionals to defend themselves in the face of challenges to their authority, but also acts as an obstacle in their intended path toward higher-status work. This concept captures how successfully claiming a jurisdiction can saddle an embedded profession with a set of tasks and expectations that *prevent* the realization of its broader professional aspirations. Second, we highlight how relational configurations – the professionals' daily interactions with immediate clients (Craciun 2018, Eyal 2013) – can complicate an embedded profession's attempted jurisdictional shift. Prior research has emphasized the role of competing occupational groups in shaping professional jurisdictions (Abbott 1988, Huising 2014, 2015). In organizational contexts, clients may not necessarily compete with professionals, but by making continual demands on the professional, they may prevent a

jurisdictional shift toward more desirable work. Third, the role of the organization in jurisdictional change becomes notable in our findings. We show how the organization played a catalyzing but ultimately unsupportive role in HR's attempted transition from legal compliance to strategic consulting, which contributed to the observed dysfunction during the attempted shift. This offers a nuanced extension of prevailing theory, which portrays organizational interference as anathema to professional autonomy (Child and Fulk 1982, Raelin 1985). Our findings instead suggest that embedded professions paradoxically might need intervention from the organization to revitalize their professional jurisdiction. Through these contributions, we bring attention to the interrelationship between the organizational context and professional work by showing how jurisdictional entrenchment both enables and constrains professionals' aspirations.

#### **JURISDICTIONAL DYNAMICS IN ORGANIZATIONS**

Professional groups seek to establish and defend the right to apply their exclusive expertise to address a class of problems (Abbott 1988, Freidson 2001). For most professions, establishing and defending a jurisdiction requires effort at two levels: the field level, where professionals engage in collective action to seek monopoly closure; and the organizational level, "where the tasks are actually performed" (Kahl et al. 2016, p. 1084). Numerous studies have analyzed field-level jurisdictional conflicts, the "turf wars" professions engage in when fighting for the same territory (e.g., Anteby 2010, Nelsen and Barley 1997). Tactics at this level include seeking a legal mandate from the state, controlling the entry of new practitioners, influencing public opinion, and integrating with neighboring professions (Freidson 1970, Suddaby and Greenwood 2005).

A complementary line of research examines jurisdictional conflicts in organizational settings, where expert groups define and protect jurisdictions by asserting task boundaries through ongoing deliberation (Bechky 2003a, Becker et al. 2002, Kellogg et al. 2006), sometimes to avoid being outflanked by a more active or enterprising occupation (Barley 1986). Zetka (2003), for example, chronicles how a high-status

profession (surgeons) essentially ignored endoscopy, which they assumed was applicable only to diagnostic procedures. This created an opening for lower-status gastroenterologists to experiment with endoscopic techniques as a less-invasive alternative to gastrointestinal surgery. Ultimately, the gastroenterologists succeeded in expanding their jurisdiction to include a range of procedures that had previously been the exclusive domain of surgeons.

In addition to defending and expanding their jurisdiction, professions must also periodically and proactively revise their claims to expertise – in other words, *shift* their jurisdiction – or risk fading into irrelevance (Nelson and Irwin 2014). The predominant understanding of this process suggests that professions do so by shedding tasks, handing them off to lower-status occupational groups (Abbott 1988). In organizational contexts, however, expert groups seeking to shift their jurisdiction cannot always “hive off” undesired work, for reasons that stem from their status as embedded professions. First, organizational boundaries act as barriers to the claiming of jurisdictional vacancies by external professions or occupations (Bidwell and Keller 2014, Pfeffer and Cohen 1984). When expert groups wish to shed tasks, but no subordinate group is available to accept these tasks, their shifts may be stymied (Child and Fulk 1982). Second, to shed undesirable tasks, professionals may attempt to transfer problem-solving skills to their internal clients. Child and Fulk (1982, p. 161) describe this process in a general sense, without paying much attention to organizational boundaries: “furnishing of codified knowledge to the general public through manuals on divorce, wills, property transfer, medical aid, and so forth has the potential for transferring the conduct of certain activities directly from the occupational member to the client.” Within organizations, however, such transfers are complicated by a number of factors, including the internal client’s willingness to take on these tasks and the intertwining of the embedded professionals’ abstract expertise and the situated, expertise they draw on to resolve clients’ problems.

For embedded professionals, the ability to address situated problems through the exercise of context-dependent judgment, rather than through the application of abstract knowledge, may ultimately be what their clients expect from them (Jamous and Peloille 1970). Accordingly, embedded professionals often premise their value on organization-specific knowledge, such as their ability to help clients deal with

unfamiliar or uncomfortable interpersonal situations. Thus relational expertise both bolsters the embedded professional's job security and autonomy (Huisling 2015) and hinders her ability to offload undesired tasks to clients. Research indicates that professionals such as attorneys, who are not embedded in organizations, rely more on relational than substantive expertise to achieve positive client outcomes (Sandefur 2015); clients may be able to read and understand a legal document but be unable or unwilling to translate the law into action without expert guidance.

Although this relational view of professional work has gained prominence in recent studies (e.g., Craciun 2018), the specific role of the client in shaping professional jurisdictions has not been fully explored. For instance, in his study of the autism epidemic, Eyal (2013, p. 869) ascribes to the “actor-network” – a group that included not only researchers, therapists, and activists, but also clients (i.e., parents) – a central role in the complex of expertise and action that led to the rise in autism diagnoses. However, this study does not explore the role of clients beyond their inclusion in the actor-network. Similarly, Galperin (2015) suggests a role for clients in the jurisdictional battle between healthcare providers and retail drug stores for control over the delivery of urgent care: essentially, the clients (i.e., patients needing urgent care) voted with their wallets, legitimizing drug stores' jurisdictional conquest. However, Galperin's study emphasizes the role of formal organizations in competing over and ultimately shaping professional jurisdictions; clients play a role primarily as economic actors responding to market incentives.

When a profession's work takes place in a hierarchy instead of a market (Williamson 1975), jurisdictions become subject to the vagaries of the organization's support, both politically and materially, for the profession's broader, extra-organizational goals. As Cohen, Burton, and Lounsbury (2016, p. 4) recently observed, “with the rise of market logics and the growing prominence of finance conceptions of control, it is not obvious that [professional] expertise can always provide an organizing counterweight to hierarchical forms of control.” In organizational settings, economic incentives place abstract professional knowledge under constant pressure of being standardized, reassigned to lower-cost labor, outsourced, or instantiated in expert technologies (Bailey, Leonardi, and Barley 2012, Sandholtz 2012, Zuboff 1988). If, for example, the organization introduces commodified expertise in the form of new technologies, embedded

professionals must find ways to “relegate commodified knowledge to subordinate groups while themselves creating and exploiting new services enabled by the commodification” (Abbott 1991, p. 28). If, on the other hand, the organization seeks efficiencies by subdividing professional tasks and reassigning some components to non-expert labor, experts must respond by restructuring their remaining work in a way that strengthens its value to the organization. Studies of production engineers in paper mills show how these technical experts participated in the deskilling of mill operators in order to underscore the jurisdictional boundary between manual labor and their own abstract, intellectual tasks (Vallas 2003, 2006).

Finally, institutional demands may put pressure on the organization to change the way embedded professionals conduct their work, creating conflict between professionals’ desire for control and the organization’s need to respond to its environment. Kellogg (2014), for example, shows how medical professionals refused to take on tasks that resulted from regulatory reform because they perceived them as low status and unrelated to their existing expertise. In response, the organization created a new occupational group to perform the brokerage work necessary for the reform to be successful.

In this paper, we observe how embedded professionals in one organization (Digicorp) used their situated skill in solving indeterminate problems, coupled with their organizationally granted mandate, to entrench their jurisdiction in the face of ongoing client challenges. We also observe how embedded professionals in a comparable organization (Technocorp) attempted to implement a jurisdictional shift away from people-facing problems and toward a set of abstract, higher-value tasks. However, their attempted shift encountered obstacles that stemmed from the nature of embedded professionalism itself: namely, that professionals make jurisdictional claims within a social context made up of entrenched interactions with internal clients whose immediate needs and priorities may be orthogonal to the profession’s extra-organizational, aspirational project. More broadly, our study illuminates the unique challenges professionals confront when renegotiating jurisdictional claims within organizational boundaries.



## **SETTING: THE RECENT HISTORY OF HR**

Human resource management is a quintessential embedded profession that has experienced numerous changes in its scope over its 100-year history and is thus an attractive setting for exploring jurisdictional dynamics. We focus here on the two most recent jurisdictional changes because our interest is in *deliberate* efforts on the part of a profession to change its jurisdiction. Many observers have commented on how HR has inherited a disparate collection of residual tasks and responsibilities over the course of its history (Drucker 1954, Legge 2005, Ritzer and Trice 1969), almost all of which have become institutionalized in its jurisdiction. In contrast, HR's two most recent professional projects were purposeful efforts to enhance "the role of human resource management as a function and its legitimacy in the eyes of its stakeholders" (Pohler and Willness 2014, p. 2).<sup>i</sup>

*Compliance-oriented HR: A Successful Jurisdictional Expansion.* The early 1970s saw the HR profession extend its jurisdiction to include Equal Employment Opportunity compliance (Dobbin 2009, Dobbin and Sutton 1998, Edelman 2016). Research by Edelman and colleagues (1999) depicts the HR profession as using an increasingly intricate web of compliance procedures to enlarge its jurisdiction. As Dobbin (2009, p. 16) puts it, HR managers saw "equal opportunity law as the profession's best chance for expansion." Dobbin estimates that between 1975 and 2000, U.S. employment doubled while HR employment increased by a factor of 10. In the practitioner world, evidence that HR has successfully claimed this jurisdiction is seen in the plethora of legally oriented publications and training courses aimed at HR professionals. The Society for Human Resource Management (SHRM), HR's largest professional association, acknowledges the profound impact of such an expansion, placing EEO legislation and related regulation in top position on its list of "10 Changes that Rocked HR" (Mirza 2005).

Two observations of HR's legal turn are relevant to our study of jurisdictional entrenchment. First, jurisdictional expansion does not equal jurisdictional shift. In its invention of EEO compliance, the HR profession did not "unclaim" any of its existing tasks, but rather added a set of compliance-oriented work practices that have become part of HR's identity and image. Second, compliance duties were forced upon

organizations by a change in their institutional environment. Because organizations could not ignore the new regulation, they had to delegate compliance duties to someone and the HR profession rose to the occasion (Sandholtz and Burrows 2016). The opportunity for expansion was therefore exogenous to the profession itself.

*Strategy-oriented HR: An Ongoing Attempt at Jurisdictional Shift.* The strategic HR movement took shape in the 1980s. Dissatisfied with HR's reputation as a compliance and administrative function, prominent voices in the HR profession articulated a business-oriented role for HR based on the notion that the competitive, profit-oriented dynamics of the market should determine HR's mandate. The term "strategic HR" first appeared in a 1982 *Sloan Management Review* article (Tichy et al. 1982), and the strategic HR movement has since generated prodigious practitioner and academic literatures (e.g., Barney and Wright 1998, Boudreau and Ramstad 2007, Jackson, Schuler and Jiang 2014, Lengnick-Hall et al. 2009, Ulrich and Brockbank 2005). Among other prescriptions, this literature specifies that embedded HR professionals (often called "HR business partners") hive off administrative duties and rely more on technology to provide self-service options to clients (Ulrich et al. 2009, pp. 60-62). Moreover, the HR business partner is admonished to shift her focus from hands-on employee counseling to the more abstract role of consulting with mid-level business-unit leaders on organization improvement projects that will contribute to the competitive advantage of the business (Rothwell, Prescott and Taylor, 2008; Wright 2008).

The strategic HR movement offers three relevant points of contrast to compliance-oriented HR. First, in its intent, strategic HR represents a true jurisdictional shift, occasioning the claiming of new tasks and the unclaiming of others. Second, the strategic HR movement is endogenous to the profession; it was motivated and promulgated by HR elites in an effort to boost the profession's impact and status. Finally, the profession's shift to a strategic jurisdiction has yet to be fully realized. Indeed, in contrast to HR's success in adopting guardianship over legal compliance in organizations, its protracted effort to claim a more strategic jurisdiction has often been characterized as a failure (Beer 1997, Heizmann and Fox 2017, Lawler 2007). The HR profession thus offers an ideal setting for studying jurisdictional shifts within organizations.

## DATA AND METHODS

### Site Selection

After exploratory interviews with HR professionals in a number of organizations, we identified two organizations similar in size, industry, and workforce composition, but different on a dimension of potential interest: one of the organizations (Technocorp) had recently reorganized its HR function to align with a popular strategic HR model (Ulrich et al. 2009), whereas the HR function at the other organization (Digicorp) had not attempted a jurisdictional shift. Table 1 compares the two organizations and their HR functions.

*[Table 1 Here]*

Technocorp's reorganization of HR began in 2008 with two objectives: to cut the cost of the HR function by \$40 million (15 percent) while increasing its service quality as judged by internal clients. Beyond dictating these objectives, Technocorp's top management team delegated to senior HR leaders the task of determining how to achieve the cost reduction goal, and these HR leaders chose to redesign the HR function and implement the strategic HR model in Technocorp. According to the HR VP who led the reorganization, "The \$40 million cut was a daunting number, but the harder work was to find out what's important to your customers, how they feel about how you're doing it, and make sure that those scores go up over time." Internal Technocorp documents state the following objectives for the HR reorganization, all of which conform to prevailing prescriptions in the HR community at the time:

- (1) Build HR generalists' "business partnering" capabilities so that the role would become "more strategic."
- (2) Drive process and program excellence and standardization through the establishment of HR Centers of Excellence for HR specialists such as compensation and benefits professionals, staffing specialists, benefits administrators, and so on.
- (3) Develop new channels for the delivery of basic HR services, emphasizing on-line tools that would enable employee and manager self-service.
- (4) Centralize most administrative HR work into a corporate shared-services center, accessed via a toll-free phone number.

Technocorp HR leaders thus made a concerted effort to remove so-called “transactional” work from the duties of HR generalists. Examples of transactional work include answering routine questions about payroll, benefits, savings, and retirement; ensuring compliance with various employment regulations; and administering basic staffing services. HR generalists were instructed to function as internal consultants to mid-level business leaders, focusing on strategy implementation, HR process improvements, leadership coaching, and organization development projects.

### **Data Collection**

The first author conducted fieldwork between May 2011 and August 2012. Digicorp was the first site studied. Observation visits typically took place over three to four consecutive days, followed by off-site time during which fieldnotes were reviewed and analyzed, and emerging concepts were discussed with other researchers. Nine Digicorp HR professionals were selected according to principles of “sampling for range,” the deliberate, non-random inclusion of three different types of informants who were germane to the study (Small 2009). Two were HR directors (managers of front-line HR generalists); six were HR generalists; one was an Employee Relations specialist who supported the generalists being studied. After spending a total of 21 observation days at Digicorp, we began our study of Technocorp, where 17 observation days took place during six consecutive weeks in the summer of 2012. Again, participants were selected from different workgroups, including two HR directors and three HR generalists.

Informants were observed over the full course of their work day. In most cases, informants consented to the audio recording of conversations and activities as they unfolded. We followed standard ethnographic practice (Agar 1980): detailed fieldnotes were recorded by hand and transcribed within a day of the observation. The resulting corpus of fieldnotes contains minute-by-minute accounts of the tasks, conversations, meetings, phone calls, and emails involving the observed HR professional – a total of 1,585 “activity episodes” engaged in by HR workers during the period of study (763 episodes at Digicorp and 822 at Technocorp). An episode consists of an activity with a beginning and an ending, for example, a

specific phone call. These episodes were categorized and aggregated, enabling analysis of the tasks and people the HR professionals engaged with as well as the amount of time that they spent on each activity.

Semi-structured interviews with the HR professionals and their colleagues supplemented the informal conversations that occurred during fieldwork. These interviews elicited informants' espoused work motives and perceived jurisdictional boundaries.<sup>ii</sup> A randomly selected panel of line managers and employees were also interviewed (Table 2); their responses illuminated how people outside of HR perceived HR's role and jurisdiction. All interviews were audio recorded and transcribed.

*[Table 2 Here]*

### **Data Analysis**

In the workplace, jurisdiction is asserted and defended in daily interactions with clients and neighboring professionals. Accordingly, the first step of our analysis was to identify each instance of professional-client interaction. We converted our fieldnotes into a separate data table for each organization and assigned a row to each observed activity episode. We listed the duration of the episode, its content (what was happening?), and whether the activity involved interaction. Exactly 900 (57%) of the episodes were interactions of various types: face-to-face meetings, email exchanges, or phone calls. These interactions represented nearly 70% of the work time we observed. We further examined episodes by interaction partner. As Table 3 shows, averaged across both sites, 55% of interactions were among HR professionals, and about 33% were between HR professionals and their primary internal client, line managers. Interactions with employees were infrequent (7%) and usually informational in nature; interactions with neighboring professionals were negligible, limited to the occasional consultation with in-house attorneys.

*[Table 3 Here]*

To better understand the nature of interactions outside of HR, we extracted from our fieldnotes the complete text of each interaction with the HR professionals' primary client groups, line managers and

employees. Based on principles of inductive data analysis (Charmaz 2006, Corbin and Strauss 2007), we coded each interaction according to the task involved. This yielded a long list of first-order codes: processing a work visa, arranging leaves of absence, administering mandatory harassment training, assisting managers with performance reviews, and so on. Temporal analysis of these codes confirmed what we had observed during our fieldwork, namely, that HR work is highly reactive, requiring its practitioners to drop what they are doing and respond to the urgent needs of clients. The professionals in our study spent on average 8 minutes on any given task; factoring out meeting attendance, the average task duration drops to 6 minutes, so around 10 different tasks per hour. Second-order coding identified themes in the task-based codes. After multiple iterations, our analysis converged on five clusters of tasks that HR professionals consistently performed in both companies: legal and policy compliance, interpersonal mediation, electronic record keeping (using the HR Information System or HRIS), organizational improvement, and staffing. An “other” category captured miscellaneous tasks outside of these five areas.

We separated the fieldnote excerpts by task area and research site, analyzing professional-client interaction for patterns of similarity and difference. In two of the five areas – organizational improvement and staffing – interactions displayed little variation between the two organizations. In the remaining three areas, interactions were substantively different. Our analysis led us to closely examine two of these areas – legal and policy compliance, and interpersonal mediation – as key instances of jurisdictional maintenance and attempted change. The third area – electronic record keeping using the HRIS – showed differences between organizations but played a minimal role in jurisdictional entrenchment.<sup>iii</sup>

To unpack how HR’s jurisdiction over legal and policy compliance and interpersonal mediation differed between sites, we sharpened our analysis to examine the “moves” that constituted each professional-client interaction. Examples of HR’s jurisdiction-related moves include asserting and defending professional expertise, asserting clients’ lack of expertise, and validating clients’ expertise. Examples of clients’ moves include validating and challenging the professional’s expertise, protesting their own lack of expertise, and complying with the professional’s advice.

The final phase of our analysis consisted of a within-organization and between-organization comparison of our semi-structured interview data. Informant interviews shed light on how HR professionals and their clients think about HR work. For example, within Digicorp, HR professionals and line managers used similar terminology to describe HR's role, expertise, and value (e.g., keeping the company out of court). Within Technocorp, HR professionals and their clients characterized HR in markedly different terms. For example, HR professionals spoke of contributing to competitive advantage and making a financial difference in the business, terminology borrowed from the broader HR profession's "strategic" project (Ulrich et al. 2005), while line managers described HR in terms almost identical to those used within Digicorp.

Our analysis of the observational and interview data, then, led us to the concept of jurisdictional entrenchment and its differential role in the two companies. We next show how, in Digicorp, entrenchment is characterized by the established pattern of attitudes and actions that sustained the profession's mandate in the face of challenges and perpetuated its claims to expertise. In Technocorp, the same pattern had inertial properties that became a barrier to successful execution of a jurisdictional shift.

## **FINDINGS**

We present typical interactions between HR professionals and their clients in the areas of greatest jurisdictional contrast between the two organizations: HR's role as enforcer of employment law and organizational policies, and its involvement in interpersonal mediation. At Digicorp, interactions followed an established set of rules. In the area of legal and policy compliance, for example, clients bristled at the HR professionals' assertion of expert authority, but eventually capitulated. In the area of interpersonal mediation, clients willingly deferred to the professionals' expertise. In Technocorp, interaction exhibited a different pattern: The HR professionals attempted to deflect a client's request for involvement in legally complex or interpersonally difficult conversations. The client either ignored the attempted deflection or insisted that the HR professional's expertise was indispensable. The HR professional eventually capitulated,

later expressing frustration at her inability to behave in a manner consistent with HR's aspirational strategic mandate.

### **Jurisdictional Entrenchment: Defending Jurisdictional Claims in Digicorp**

Being the face of legal compliance and defending organizational policies frequently placed HR professionals in an adversarial role with their clients. In other situations, Digicorp HR professionals mediated conflicts between line managers and employees. By skillfully managing and often integrating tasks associated with these two areas of responsibility, Digicorp HR professionals defended their jurisdictional claims within the organization.

*Enacting the legal and policy compliance role.* Digicorp HR professionals drew on their knowledge of the organization's policies and state and federal employment law in order to influence client behavior. Consider the following situation involving Roger, a newly-hired HR professional, and Phil, a senior VP of engineering. During a Q&A session led by Phil on the day before our observation, Karthik (an employee) publicly challenged Phil regarding the company's motives in an impending relocation to a neighboring city. Phil took offense and contacted Roger after the meeting, asking that Karthik be terminated. The following summary from our fieldnotes shows Roger weighing how to respond. Phil's proposed action would create a legal liability for the company (i.e., the possibility of a retaliatory dismissal lawsuit), but Roger is sensitive to the power differential between him and the senior executive:

Roger agonizes over his message to Phil. He seeks counsel from one of his mentors, an experienced HR director. Her advice: Frame the message to Phil in both cultural and legal terms. "We're an open culture," she says. "We encourage employees to ask questions, even if we don't like the questions. Plus firing him would look like retaliation." She offers to write the email; Roger is visibly relieved. Throughout the day, Roger follows the email conversation and gathers additional information by interviewing Karthik and Karthik's immediate supervisor. Roger learns that Karthik's confrontation was unskilled but not ill-intentioned, and that he was already planning to resign in two weeks. The HR director requests that Roger put this information in a summary email to Phil. "Don't you think that Phil will flip out?" Roger asks. "He will," she says, "but you still have to do it. We don't fire people just because they ask questions, especially if they're already planning to resign." Phil's reaction to being



scolded and reined in by HR is a sardonic reply via email: “Maybe in the future, I should just let HR handle all my communication regarding the office move!”

This interaction shows how an inexperienced HR professional successfully prevailed over his client, despite the client’s position of greater organizational power (i.e., a VP), higher occupational status (engineering), and longer organizational tenure. The junior HR professional invoked HR’s organizational mandate to prevent violations of employment law, translating this mandate into a specific cultural rationale that challenged the line manager’s preferred course of action. Although in this particular instance the HR professional did not help solve a problem from the line manager’s perspective, he was able to assert HR’s authority by invoking the specter of potential litigation, which led to the line manager’s begrudging capitulation.

Defending their claim to authority over a category of problems was an ongoing accomplishment for the HR professionals within Digicorp. In describing their view of HR, Digicorp’s line managers and employees frequently mentioned the tension present in interactions with HR and suggested that it arose from what they perceived to be HR’s primary purpose: to keep the company from getting sued. Because their clients contested this mandate in practice, HR professionals asserted their authority over this matter by actively taking responsibility for the process that mitigated these risks. For instance, in the following interaction, Vishak, a male finance executive with a degree from a top-20 MBA program, had set up an employee suggestion box for his organization. Samantha, his female HR generalist who studied art in college but never graduated, wanted him to remove the suggestion box:

*Vishak:* I thought a suggestion box was a way to get input on the real issues people are afraid to raise. . . . The reality is that Joe Analyst isn’t going to come to my office and say, “You know, this is really pissing me off.”

*Samantha:* I agree with your intent to gather more information. I just want to avoid the situation where someone puts a comment in there, then somehow you figure out who they are and you start treating them differently. . . . I just don’t want to circumvent the open-door processes that are already in place.

*Vishak* [clearly exasperated]: But what does “open door” mean if no one comes through the door?

*Samantha* [calmly]: It means if we get a lawsuit and the employee never availed himself of it [the open-door policy], we have a defense.

*Vishak* [mockingly]: Great, so we're going to run the company on the basis of our fear of lawsuits. . . . Who's saying we shouldn't have a suggestion box?

*Samantha*: I'll take responsibility for it. I have 30 years of negative experiences with suggestion boxes.

*Vishak*: What kinds of experiences?

*Samantha*: For one thing, people will submit stupid suggestions, but even those raise expectations that the company will somehow deal with them. Second, if they're anonymous suggestions, we can't follow up. We have no way of knowing exactly what the person meant. . . . If you get a comment like "I'm not being treated fairly because I'm the only woman in the group," how do you follow up? We're now legally obligated to deal with it but we don't know how. Plus, how do you ensure anonymity with a comment like that?

*Vishak* [after a long pause]: So what's your guidance?

*Samantha*: Make your administrative assistant the collection point and encourage people to put their names on their suggestions. Don't make it something hidden.

*Vishak*: So is the issue one of litigation?

*Samantha*: At the extreme, yes.

*Vishak* [with resignation]: I'd like to explain to the group why we're taking the suggestion box down, something like, "It's not part of our corporate culture." I don't want to say, "HR told me to remove it."

*Samantha*: I'll come up with some talking points for you, if that would help.

This conversation illuminates how the HR professional's invocation of the threat of legal sanction was coupled with offers to take responsibility for and manage the process of eliminating a potential legal challenge. Doing so achieved the HR professional's immediate objective – removal of the suggestion box – and at the same time gave her leverage over a cantankerous client, thus reinforcing her jurisdiction in matters related to employment law.

Beyond their role in translating knowledge of the law into specific advice for line managers, HR professionals played the role of watchdog around matters of organizational policy. Consider an episode in which Vivian, an HR director, is meeting with two line managers, Dave and Hakan, who want to promote three of Hakan's employees but have budget to promote only one of them. The managers accuse Vivian (and HR in general) of implementing an arbitrary quota on promotions; Vivian calls it a "guideline"

intended to keep the organization within its salary budget. The managers protest that they alone should determine how many of their employees get promoted.

*Dave* [to Vivian, accusatorily]: The “guideline,” as you call it, turns into a quota if you try to go above it. [My manager] says he’ll arbitrarily lower the number of promotions if we go over the guideline. Tell me how that’s not a quota!

*Vivian*: I have to say that I find the tone here a little insulting. I could be sarcastic, too, if I wanted to be. I’m not going there, and I request that you not go there either. Let’s keep focused on working this out. . . .

*Hakan* [more calmly]: OK . . . I understand we need structure in this process and that we can’t have everyone violating the guidelines all the time. But in our experience, above the guideline, we run into a brick wall.

*Vivian*: Are we talking about one additional promotion or two?

*Dave* [after mentioning that three employees need promotions, but only one has threatened to quit if not promoted]: We feel we’re being blackmailed into doing something because the person threatens to quit. . . . My tendency would be to be punitive against the person in that case – to not promote them *because* they threatened to quit. . . .

*Vivian*: I must say I’ve been surprised by the language you’re using. You are directors in the company, but you use language that makes you sound like victims – “forced” to do things, “blackmailed.” You can’t afford to come across that way – especially not in front of your employees.

*Dave*: What could I say differently?

*Hakan* [with an ironic half-smile]: She just wants you to use a more HR-friendly word!

*Vivian*: Not true! I’m against HR buzzwords as much as you are.

After much back and forth, this episode ended with Vivian convincing the line managers to submit only the most qualified employee for promotion, while offering the other two employees advice on how they could boost their eligibility for the next round of promotions. Of greater interest than the outcome, however, is the process involved. The HR professional defended her knowledge of guidelines throughout the negotiation, reading the managers’ frustration and confidently defusing their frustration and sarcasm. By doing so, she ultimately defended the organization’s promotion policy and reinforced HR’s jurisdiction in such matters.

*Enacting the interpersonal mediation role.* In contrast to the adversarial nature of legal and policy enforcement, interpersonal mediation was a task that clients voluntarily ceded to HR professionals. Some of Digicorp's HR generalists found this aspect of their work meaningful, as illustrated in the following comment from Samantha: "Where's my real value? I think it's in those interaction things, the 'I'm pissed off today and what are you going to do to make it right?' conversations. It's being the neutral ground." Some of Samantha's HR colleagues had a less positive view of interpersonal mediation; Elena, for example, described her role as "a combination of a mother, a firefighter, and a pooper scooper."

Whether viewed positively or negatively, the professional's willingness to be a mediator placed her in a position of influence over clients embroiled in interpersonal conflict. The following episode typifies the HR professional's role in these sensitive situations. Peter, a program manager, was meeting with Samantha and Leah (an HR specialist) to discuss Alisha, an employee in Peter's team who was accused of having an affair with Don, a supervisor in a neighboring group. Rumors had circulated about Alisha flirting with Don during meetings, taking long lunches with him, and receiving preferential treatment from him. Peter was Alisha's "skip-level" manager; she reported to a supervisor who reported to Peter. As part of their systematic investigation, Samantha and Leah had conducted interviews with all of the parties involved.

Samantha frames the meeting by telling Peter, "We need to get it all out in the open. It's like they say: Until you rip off the Band Aid and expose all the ugliness, nothing will heal." She introduces Leah as one of her "most important partners."

*Leah* [reporting on her conversation with Alisha]: We talked yesterday. . . . I don't think she's handling the situation very well. She is stirring up the allegations and complaining to lots of people. She's not taking responsibility for her own career and image.

*Peter*: I don't know for sure who has leveled the allegations [against her], but I have a pretty good guess and I bet I'm right.

*Leah*: It's not just one person who has alleged the behavior. Many people talked about it.

*Samantha*: And when we get those allegations, we [HR] have to look into it. We can't just ignore it. Samantha and Leah brief Peter on the substance of the alleged behaviors. Eventually, they recommend getting everyone in the same room to surface concerns and clarify that any unprofessional behavior,

including rumor-mongering, must stop. Ideally, Alisha's direct supervisor and team leader would facilitate this meeting but Samantha doesn't think they're capable of it.

*Samantha:* They [Alisha's supervisor and team leader] are good technical people but they're in over their heads and they don't reach out to HR. No one teaches managers this stuff when they're promoted. Samantha and Leah recommend holding "professional conduct" training for everyone involved.

*Samantha:* Timing is crucial – with [performance] reviews coming up, we need to document these issues and make expectations clear.

After discussing the situation further, Peter's frustration boils over.

*Peter:* I'm ready to walk her [Alisha] out the door!

*Samantha and Leah* [in unison]: You can't walk her out the door if she hasn't been told what she needs to change!

*Samantha:* I hope you put Leah and me on your speed dial for the next while. You should call us whenever you get a request or question that you don't know how to respond to. . . . How quickly can I hold these [professional conduct training] meetings – within the next three days?

*Peter:* Yes, anytime except noon to 4:00 on Thursday.

The discussion concludes with Peter offering to attend – not lead – the meetings. Samantha is clearly in charge.

In this conversation, the HR professional asserted ownership for solving the problem, invoking managerial incompetence to justify her continued involvement; the client did not contest her intervention. In fact, in this and similar instances, professionals and clients drew on a common occupational trope: namely, that engineers are technically brilliant but interpersonally inept and, therefore, ill-equipped to handle interpersonal issues. As Tricia, an HR director, put it, "Especially at Digicorp, with a lot of engineers, a lot of times [the managers'] skill set is not in the interpersonal situations." Numerous clients shared this self-incriminating stereotype, expressed here by an engineering manager: "Digicorp is an engineering company, and as far as I'm concerned, engineers – most of them – make horrible managers. They don't do any kind of interactive talking with their groups."

The notion of engineers as "horrible" managers legitimated HR professionals' intervention in the manager-employee relationship. Digicorp's HR professionals identified strongly with this mediating role. When asked to name their primary stakeholders, the vast majority of informants offered some version of

the following answer, provided by Janet, an HR generalist: “We’re on the fence. Employees say, ‘You’re here for management,’ and the managers say, ‘You’re always on the employee’s side,’ but the reality is, we’re the ones who are balancing that [relationship].” We witnessed HR professionals trying to maintain this difficult balance in their frequent mediation episodes.

One of the primary ways in which they reinforced this facet of their jurisdiction was to work one-on-one with employees who were in difficult interpersonal situations. A Digicorp employee, for example, appreciatively described his most recent interaction with his HR generalist:

[My manager] is a very intense person who can be a little volatile. He’s a loud talker and sometimes, when he gets excited about things, he just gets really loud and in-your-face, so people get offended. Besides that, he was having these political spats with another manager who was being given responsibilities that were kind of overlapping; the two of them were having issues. So, Elena [his HR generalist] came to discuss some items and actions that occurred with me relating to this guy.

The employee recounts how the HR professional not only took note of the problematic behavior of a line manager, but directly coached the junior employee on how to manage the potential problems that his manager’s behavior might create. By proactively attending to the idiosyncratic situations of individual employees, HR professionals further reinforced their jurisdiction in the organization as the authorities on interpersonal mediation.

### **Explaining the Failed Jurisdictional Shift at Technocorp**

At Technocorp, HR professionals who previously worked with clients in a direct, hands-on advisory role similar to that at Digicorp attempted to distance themselves from this approach following the reorganization of the HR group and their stated objective of becoming strategic partners to line managers. However, this attempted jurisdictional shift was largely unsuccessful, in part because tactics similar to those exercised by Digicorp HR professionals to reinforce their jurisdiction – invoking their expertise related to legal compliance and organizational policies, and demonstrating their capacity to mediate manager-employee relations – had calcified into a set of client expectations on the part of both line managers and employees.

*Failure to shed the legal and policy compliance role.* Offloading compliance tasks, as specified in Technocorp's HR reorganization plan, was a frequent topic of conversation among Technocorp's HR professionals. On one afternoon, we participated in an HR staff meeting in which Amy and her colleagues spent three hours listing on flipcharts the compliance tasks and other activities they felt were no longer appropriate for their role. The conversation was emotionally charged, and the meeting resulted in a list of actions they could implement to "get out of the business of being the police," in the words of Karla, one of the participants.

We observed a number of interactions in which HR professionals attempted to avoid being the police and were met with implicit and explicit resistance from clients. For instance, Jason, a Technocorp HR director, recounted an experience in which he tried to avoid the traditional HR task of legal and ethical watchdog and experienced tension as a result:

I was sitting in a room a year or so ago, and a bunch of managers were in there and no HR people except me.... Somebody made a slightly off-color joke. It wasn't that bad, but it was enough that it raised a few eyebrows. So two or three of the people in the room looked over at me and I looked back at them and widened my eyes and said, "What?" And one of them said, "Aren't you going to say something?" I said, "So if I wasn't here, a comment would go unsaid?" Right? "Like, what, you think I'm somehow the conscience of everybody else? Because if it bothers you, you should say something. If you think it's inappropriate, you should say something. Don't look to me as your legal conscience."

This retelling shows how clients expected the HR professional to police all instances of potential harassment, while the HR professionals were attempting to shed this task by encouraging the clients to attend to issues of appropriateness and legality.

Client resistance is further illustrated by the line managers' reactions to a suite of online legal tutorials, introduced as part of the HR reorganization. The tutorials were intended to educate Technocorp line managers and keep them on the safe side of the law. Line managers, however, felt that the online tools did not help much. For instance, Craig, an engineering director, described how the tutorials stopped short of providing the type of situation-specific guidance that HR professionals formerly provided:

I think bringing on more web-based tools has been a good thing, but I think it's also been a strain on the engineering folks because it's not really the domain that they're normally used to working in. And so if you terminate a person, how often does that happen and how good are you at actually doing it? There's a tool that kind of walks you through it, but are you forgetting things? . . . So I think that's probably the toughest thing on the managers – just the additional responsibilities. . . . Or it could be putting together a package for someone who's underperforming and what kind of package do you need that would hold its weight in court? And how do you conduct yourself and provide the right kind of documentation? Things like that – areas that engineering managers . . . don't get exposed to very often.

In other words, the self-monitoring of legal compliance was a responsibility Technocorp line managers felt unqualified to assume because they lacked both the legal knowledge and the confidence in their own ability to protect the company from legal liability. They thus continued to rely on their HR generalists for professional help on legal matters. In one instance, Irene, an HR generalist, was preparing to attend a performance improvement (PI) meeting. Technocorp policy did not require HR's attendance at such meetings. Irene had a busy afternoon and would have preferred not to drive the 30-minute round trip to the satellite office where the meeting would take place. However, she felt obligated because both the manager and employee had requested her presence:

Irene goes over her schedule for the day. Her main concern is a PI discussion later in the day. "I'll have my purse with me with tissue in it," she says. "These kinds of meetings often result in the employee reduced to tears." Irene talks about how she tries to prepare managers for the worst-case scenario: "I require that managers write up a summary [of their conversations with the employee], because if I wind up in a termination situation, I need to have the documentation that says, 'We did meet regularly. This is what we discussed.'" She clarifies that she doesn't need to be in these meetings: "I think it's a little heavy to have two on one [i.e., manager and HR generalist vs. employee], but if they ask me to [attend], by all means. . . . I see myself as kind of the third-party intermediary to facilitate the conversation. . . . I let the managers introduce why we're here . . . and usually they say, 'Irene is here to make sure I don't screw anything up.'"

The next day, Irene recounted how the PI meeting went. She thought she had prepared the manager to lead the conversation: "I had instructed him, you know, 'You're going to lead this. I will interject as appropriate or support you where you need it.'" As the meeting progressed, however, the manager increasingly deferred



to Irene. She ended up taking over the manager's role entirely. She described the employee's poor performance, clarified what improved performance would look like, and communicated the consequences of non-improvement: "Look at this PI plan. Read it. Understand it. Because if you fail to meet the criteria as outlined, we will be forced to take further disciplinary action up to and including termination."

*Failure to shed the interpersonal mediation role.* The foregoing example illustrates another key component of the strategic redesign of Technocorp's HR function: HR professionals were explicitly instructed to not spend their time counseling employees or mediating interpersonal disputes. Rather, they were to refer employees to the toll-free help line and coach line managers on how to resolve such problems. However, like their knowledge of the law and their deep understanding of organizational policies, HR's interpersonal mediation skills acted to entrench professionals in their roles and their relationships with line managers; ongoing requests for HR to manage episodes requiring interpersonal mediation became a barrier to their desired jurisdictional shift.

Both Digicorp and Technocorp were engineering-intensive companies. In the divisions we studied, most of HR's managerial clients were engineers who had been promoted. These clients frequently invoked their engineering roots to rationalize their lack of interpersonal sensitivity, which in turn justified involving HR professionals in a variety of managerial situations. As outlined above, the informal understanding of engineers' interpersonal incompetence was shared between HR professionals and their clients in Digicorp, thus reinforcing an entrenched jurisdictional boundary. In Technocorp, however, HR professionals tried to refute this stereotype and sought to inculcate interpersonal skills in their managerial clients in order to reduce the burden of mediating managers' interactions with their team. But Technocorp's line managers were reluctant pupils and exhibited little hesitation in proclaiming their interpersonal ineptitude:

Karima is meeting with an engineering VP named Carlos, reviewing the performance of Randy, one of the engineering directors who report to Carlos. Randy's group is running behind on its projects and asking for more staff to complete the work. Yet Carlos has other directors who are equally if not more understaffed and still managing to hit their project deadlines. Carlos presents two potential options, the second of which involves having a difficult conversation with Randy.

*Carlos:* You tell me, dumb old engineer that I am. I see two things I can do. . . . Which path should I take?

*Karima:* Path B [i.e., have the conversation with Randy]. You have to. It's an easy choice – that's why you're paid the big bucks.

Karima proceeds to coach Carlos on how to approach this delicate conversation, given that Randy feels defensive about his group's performance.

*Karima:* You need to make the case, paint the picture. But acknowledge him, recognize that his group aren't a bunch of slackers. Lay out the rationale for him, using these numbers. . . . You need to talk to him, like, 'Randy, I need you to tell me what you would do if you were in my shoes.' . . . When do you plan to do it?

*Carlos:* Soon.

*Karima* [showing support but making it clear Carlos can handle this on his own]: Keep me posted.

*Carlos:* What do you mean? I want you in the room!

*Karima* [unenthusiastically]: Yeah, OK.

This interaction exemplifies how clients invoked their lack of interpersonal skill in order to perpetuate HR professionals' involvement in these uncomfortable tasks. Despite the HR professional's efforts to coach and train, line managers continued to expect ongoing involvement from HR. Jason, an HR director, described this process as follows:

It's a little bit about the "teaching them [the managers] how to fish" concept so that we're not spoon-feeding the employees. If I see an HR person who meets with a bunch of employees, that bothers me because those employees are supposed to be getting their help from their leaders, and the leaders are supposed to be equipped by the HR person to handle all those inquiries and solve all those problems.

We observed numerous unsuccessful "fishing lessons," most of which were focused on low-performing employees. Consider the following typical interaction. Rod, a line manager, and Amy, an HR generalist, are meeting to discuss two of his employees who are not meeting expectations:

Rod arrives for the meeting. After some chit chat, he begins talking about Chloe, an employee who is on a performance improvement (PI) plan, but is not improving. Amy suggests that it may be time for Rod to terminate Chloe.

*Rod:* When is the right time to communicate those consequences to her? After the next meeting?

*Amy* [emphasizing that Rod can do this himself]: In your next meeting, you can evaluate how she's doing on each element of the PI plan. If it looks like she's not going to be working on it, we need to move forward with the termination.

The conversation shifts to Adam, an employee whom Rod describes as “doing well scientifically but socially struggling.” Amy listens, then turns to her computer.

*Amy* [pointing and clicking her way through various screens]: There's an overwhelming amount of tools and resources available on the Personal Development website: stuff about the different behaviors, time management....

*Rod* [ignoring the online material]: What I think he needs to work on is . . . [to quit] acting like an intern. He shows up and waits for people to tell him what to do. . . . He needs to show some leadership and take initiative. . . . Is there anything specific I should do?

Amy goes over some pointers about how Rod can hold the conversation with Adam. She opens a personal development form on the website. “OK, I'll send this to you and I'll keep thinking about what might help him,” she says.

*Rod* [hesitating]: In the midyear review, he was receptive at least. Whereas Chloe is *not* receptive.

*Amy* [in pep-talk mode]: It's a much different experience when the employee is open to it and participating in the improvement. So you've got both ends of the spectrum. That's why you're a manager!

Amy is ready to wrap up the meeting. She exits out of the Personal Development website and stands up. Rod heads for the door, pauses, and asks, “Are you going to be able to participate in our next meeting with Chloe?”

Amy smiles weakly. “Yeah, I'll be there,” she says.

In this interaction, the HR professional is seen coaching and advising the client, pointing him to online resources, but stopping short of offering to hold the uncomfortable conversation for (or even with) him. The client shows reluctance and, at the last minute, entreats the HR professional to accompany him; she reluctantly consents. Her attempt to relinquish a long-standing HR task is thwarted. An engineering VP put it bluntly in an interview, when asked what would happen if there were no HR function:

For me, it means I would have—I would be doing more of that work... [My HR director] is really good at what she does, and our [HR] staff, the ones that I've met—they're really good too. She's better at dealing with a lot of human issues than I am. I know that. And her people are better at dealing with human issues than a number of my leaders. So, they're additive. . . . They're skilled in different stuff

than we are. It's like the difference between a tradesman that does tile work and a weekend guy that decides he's going to put in a tile floor.

The analogy of amateurs vs. professionals is telling. Managers viewed their interpersonal competence as rudimentary compared to the skilled "tradespeople" in HR, even though these tradespeople did not want to be defined by their interpersonal expertise.

As noted in the example with Amy and Rod above, Technocorp's HR professionals wished to shed the burden of dealing with employees on behalf of line managers. Similar to the online legal tutorials available to managers, a suite of internet-based self-service tools had been made available to rank-and-file employees as part of the HR reorganization. Employees were instructed to access these online tools or call a centralized HR help center to find help with their problems. These changes were intended to both trim costs and enable the professionals to focus exclusively on the needs of their managerial clients. Technocorp's vice president of HR explained in an interview, "I want my generalists focused on supporting the managers, not the employees. They need to be business partners."

By deliberately shifting away from the mediator role, however, Technocorp's HR professionals invited criticism from employees who felt abandoned. In the following excerpts, Jenn had just finished facilitating a focus group in which employees vented their anger at recent changes in their health benefits, with HR as the perceived originator of these changes. In reality, the changes were a business decision made by the CEO. According to Jenn, it would have made more sense for a line manager to facilitate the focus group and represent the organization's point of view. Jenn, however, was asked by a line manager to be the facilitator. She had remained calm and professional in the face of the employees' disrespectful comments; she came out of the meeting visibly shaken:

"That's the hardest thing I do in HR," Jenn says. "It's a hard position for us to be in. There are things we can't change.... We're the ones saying, 'We're going to cut your pay,' or, 'We're going to terminate you,' or, 'We're going to make life really difficult for you' – like we're all just out to get them [the employees]. Their manager ends up looking good because they don't usually like you."

Later, Jenn is meeting with Rich, an engineering director. He asks how her week is going, and she mentions her negative experience with the employee focus group.

*Jenn:* I got a lot of people hating HR!

*Rich* (jokingly): Don't they give you classes on that in school? HR Bashing 101! It's too easy to bash HR.

Jenn offers a half-hearted chuckle and changes the subject.

The next day, Jenn commiserated with Brandi, a fellow HR generalist:

Jenn is at her desk, checking emails. Brandi drops in and the two strike up a conversation. Jenn tells her about yesterday's employee focus group and how rough it was.

*Jenn:* I woke up at 2 a.m. thinking I'm not going to do that last focus group today. No way!

*Brandi:* Managers should do it themselves. They own the action plan.

*Jenn:* They'd rather have HR do it.

*Brandi:* Yeah, let HR get their butts whipped!

Executives were aware of the gulf between HR professionals and their former clients, the employees, as illustrated by this statement from Carlos, the engineering VP quoted above:

Once upon a time, we had a wonderful woman who worked in the HR office where some of Karima's people sit. . . . Her most visible role was she was the person to go to for anyone on this campus who had a question about benefits and healthcare and the like. Everybody knew [her] on a first-name basis . . . and she's gone. She's been replaced by a phone number. You know people are going to struggle with that.

To document the phenomenon more systematically, we re-coded the non-HR interview transcripts from both organizations, tagging instances of criticisms or negative comments about HR. The ambient level of criticism of HR was nearly identical in both organizations; as mentioned above, Digicorp's professional-client relations were often adversarial. A stark difference emerged when the negative comments were sorted by theme. Two-thirds of Technocorp's non-HR informants mentioned HR's abandonment of employees.

*[Table 4 Here]*

These patterns attest to an organizational cost incurred in Technocorp HR's attempted jurisdictional shift. Employees – traditionally, a mainstay of HR's jurisdiction – felt alienated from HR and questioned whether anyone would notice if the function vanished altogether. “That’s the direction I see Technocorp and most other companies going,” said one of the engineers. “They’ll have a few HR people and the rest of the function will be outsourced.” The pervasive resentment created by HR's absence acted as a final barrier to their attempted jurisdictional shift. In a follow-up interview after the completion of our field study, we learned from a Technocorp HR professional that the organization had retreated from having employee issues resolved remotely:

Around the end of 2014, [Technocorp] renewed the effort to provide timely HR answers to basic questions. We were hearing that too many employees felt they didn't have support from HR. This required that we re-examine what work could be done centrally and what had to be done locally. We always knew that some issues can't be offloaded. Anything that requires the HR generalist's expertise – performance management, coaching a manager, employee relations issues – has to be handled locally. . . . Employees wanted the comfort of talking with someone they could go find in an office, and some HR generalists felt threatened that their job wouldn't be around if they no longer took calls from employees and handled their questions.

This outcome illustrates how ultimately, Technocorp HR professionals failed to remove themselves from the interpersonal mediation role, which hindered their jurisdictional shift to a strategic consulting role.

## **DISCUSSION**

This article examines the challenges that professionals embedded in organizations experience in shifting their jurisdictions. Jurisdiction has long been conceptualized as the ties that bind a profession to certain tasks (Abbott 1988). More recent studies emphasize that jurisdiction is also defined by relational ties to surrounding professions, clients, and managers (Anteby et al. 2016, Eyal 2013, Huisman 2015). These ties prevent laypeople or adjacent professionals from exerting competing claims over tasks, and give members of the profession exclusive right to remuneration (Nelsen and Barley 1997). For embedded professionals, these ties must be continuously reinforced in the course of their work. Professionals demonstrate their

abstract and situated expertise by applying it to problems, frequently doing so in coordination with other expert groups (Bechky 2003b). This focus on the process by which expert groups preserve their authority over tasks in organizations has somewhat obscured a contrasting process that, over time, has the potential to reshape the nature of a profession's jurisdiction: bridging the gap between the observable and aspirational work activities of a profession.

Professionals may periodically seek to shift their expertise toward problems that reflect their goal of maintaining their power as a collective actor in society (Abbott 1991). Broadly speaking, these jurisdictional shifts require two movements: a profession relinquishes certain tasks, activities or clients—those it sees as no longer desirable—and adopts others. Following Abbott (1988), most scholars have focused on jurisdictional expansion. This is perhaps because relinquishment has been seen as unproblematic: once a profession hives off less desirable tasks, activities, or clients, a subordinate profession almost always arises to claim the leftovers.

However, embedded professions face different challenges when attempting to shift their jurisdiction. First, they cannot unilaterally choose the tasks they will perform and the clients they will serve, nor have they any influence on whether a subordinate profession will be available to absorb their unwanted tasks (Bidwell and Keller 2014, Pfeffer and Cohen 1984). Therefore, members of an embedded profession confront an irony unknown to external professions: they rely on the organization's active participation in order to preserve a semblance of professional autonomy (Pine and Mazmanian 2017). Second, their work activities are likely to involve working with, advising, or serving other groups within an organization, and therefore the process of claiming and shedding tasks may be complicated by factors such as hierarchy, history, and interdependent work outcomes.

Our analysis contributes to a better understanding of the difficulties associated with jurisdictional shifts under conditions of organizational embeddedness. In Digicorp, HR professionals were not seeking to shift their jurisdiction; instead they sought to implement their organizational mandate by proactively exercising their legal expertise to solve the various problems of line managers, their primary clients in the organization. By doing so, Digicorp HR professionals defended their jurisdictional claims from the continuous minor

attacks that characterized their relationships with line managers, achieving *jurisdictional entrenchment*, a condition in which embedded professionals have accumulated tasks, tactics, and expertise that enable them to make jurisdictional claims in an organization. Our findings at Digicorp show how professionals integrate multiple tactics – translating broad policies into specific consequences, exercising interpersonal skills to prevent these consequences, and working face-to-face with managers and employees – to build a multi-faceted approach to addressing problems within their jurisdiction while simultaneously mitigating client resistance. These findings served as a lens through which the elements of jurisdictional negotiations with clients came into focus, and highlighted the contrasting effect of jurisdictional entrenchment in Technocorp.

Digicorp HR professionals met three main organizational goals through their situated, proactive approach: they quelled potentially inflammatory issues before these issues became organizational liabilities by invoking legal rationales for halting inadvisable courses of action; they confronted and cajoled line managers to help them eliminate counterproductive or offensive behaviors that would lead to future legal issues or dampen employee morale; and they contributed to the wellbeing of employees by helping line managers in sensitive discussions and even directly by coaching employees on how to cope with difficult managers.

The concept of jurisdictional entrenchment builds on Huisings's (2015) notion of relational authority, but shows how it can backfire under certain circumstances. At Technocorp, the findings reveal how attempted jurisdictional shifts are impinged upon by intersecting organizational, professional, and client objectives. These objectives were misaligned as a result of HR's decision to follow a professionally motivated plan of action (i.e., adopting the strategic HR model) in response to an organizationally motivated budget cut. To be sure, the reduction in HR headcount precipitated by the budget cut made implementing the strategic HR model more difficult. A larger HR staff may have enabled the HR generalists to delegate more of their compliance and mediation tasks to junior HR colleagues. We were unable to observe this counterfactual, however. Instead, we witnessed Technocorp's HR professionals, who had historically premised their jurisdictional claims on legal expertise and interpersonal mediation skills, seeking to shed these activities yet increase their value to the organization by becoming business partners to line managers.



The line managers, unencumbered by HR's professional aspirations, continued to seek the presence and advice of HR professionals when engaging in difficult conversations with employees, and sought to hand off to HR situations that might result in legal liabilities because they felt unprepared to assume these risks. HR professionals continued, albeit reluctantly, to perform these tasks.

It may seem plausible that Technocorp HR failed to secure its clients' cooperation with their desired shift due to a deficit of relational authority. Such a conclusion, however, would ignore an empirical reality and elide a theoretical distinction. Empirically, we observed relationships of trust between Technocorp's HR professionals and their line-manager clients, who used terms such as "consiglieri" and "confidant" to describe their HR generalist. The failure of HR professionals to move away from their customary jurisdiction was, if anything, a reflection of their close, trusting relationship with clients. Whereas Huising (2015) asks, "How do professionals exercise sufficient authority to enact their assigned jurisdiction?" we ask, "How do professionals *change* their jurisdiction?" The professionals' willingness to take on undesirable tasks (or scut work) is consequential in both situations, but with potentially opposite effect. In the research labs Huising studied, the performance of scut work enabled professionals to build relational authority. In Technocorp, the continued performance of what were now perceived as "low-value" tasks both reflected and perpetuated jurisdictional entrenchment, which the HR professionals struggled to alter. In other words, the two studies together suggest that by building relational authority through undesirable work, professionals enhance their ability to apply their expertise *within* jurisdictions but compromise their ability to *shift* jurisdictions.

### **Contributions**

This paper contributes to the understanding of jurisdictional shifts in organizations by theorizing how the tactics of defending jurisdiction can become barriers to the accomplishment of a jurisdictional shift. First, the analysis shows that the barriers to Technocorp HR's jurisdictional shift stemmed from their situated expertise, interpersonal skills, and mediating role between line managers and employees. Rather than barriers created by challenges from adjacent professions or organizational bureaucracy, professionals can

face difficulty in pursuing jurisdictional shifts as a result of their own competence and demonstrated ability to solve important problems. Because this barrier to shifting cannot be overcome by garnering more external legitimacy or developing greater or different expertise, professionals may find themselves tactically unprepared for the process of shedding tasks that they no longer want to perform but that remain valued by their clients.

Jurisdictional entrenchment occurs when an embedded profession has sufficiently shored up its claim to control a class of problems through a variety of activities that are difficult to disentangle. Whereas jurisdictional entrenchment works to the benefit of professionals beleaguered by challenges from other groups in an organization, it has a deleterious effect on professionals who wish to change their work activities to realize higher-order goals than those enabled by an existing organizational mandate. Entrenchment, unlike jurisdictional expansion, occurs at the level of the individual professional, who is unable to partition her attention and time sufficiently such that movement to higher-value work can be achieved without letting go of lower-value work within an organizational employment context. Although the profession as a whole may adopt the rhetoric of reinvention and exhibit some signs of expansion to higher-value work, the individual professional whose jurisdiction in the organization is characterized by entrenchment faces difficulty in aligning herself with this movement. As a result, the broader profession's aspirational jurisdiction may be out of touch with the daily work of its members, who continue to do the tasks that allowed the profession to claim an organizational mandate in an earlier phase of its evolution (Dobbin 2009, Edelman 2016). Individual professionals may not be able to renegotiate this claim nor abandon the tasks which comprise it in the workplace.

Second, our study addresses recent calls to more closely examine relational configurations, particularly professional-client relations, in organizational settings (Anteby et al. 2016, Huising 2015). Our findings show how clients, and not merely other professional groups, are instrumental in preventing jurisdictional shifts. Circumscribed by an organizational boundary, professionals depend on assigned internal clients to exercise their professional mandate. Technocorp HR professionals attempted to shift their jurisdiction away from dealing with employee problems and toward providing strategic advice to line managers. Within an

organizational structure, however, employees and managers are bound to one another by hierarchy; the line managers' job is to supervise employees. Technocorp's HR professionals could not fully disentangle themselves from their employee-facing tasks, because their clients – line managers – continued to enlist their help with exactly these tasks. In effect, HR professionals were constrained by the nature of the relationship between the two client groups (managers and employees), which was often sensitive and contentious.

Even though client interdependence has long been recognized, its implications for having attempts in professional jurisdictional shifts have not been fully articulated (Freidson 2001, Sturdy et al. 2009, Waisberg and Nelson 2018, Wright et al. 2017). The implication from our study is that any profession that serves interdependent clients will have difficulty severing its relationship to one of the clients. This might also be true, for example, in the case of mediators, who have jurisdiction over the relationship between plaintiffs and defendants (Morrill 2008), and patient advocates, who have jurisdiction over the relationship between medical staff and patients (Heaphy 2013). More broadly, the predominant theory of jurisdictional change assumes a world in which clients are independent of each other, enabling a profession to separate itself from one group and associate with another. We add a corollary to this theory to account for client interdependence, which may be increasingly common in complex organizations.

Finally, our study sheds light on the role of organizations vis-a-vis embedded professions. Scholars have long theorized that organizations and professions do not mix well. Whether in early claims that bureaucratic governance was antithetical to professional organizing principles (Freidson 1970), or subsequent predictions that organizations would eventually “deprofessionalize” expert labor (Haug 1975), the assumption has been one of heavy-handed interference on the part of organizations in the work of the professionals they employ. Neither at Digicorp nor at Technocorp, however, did we find evidence of upper-management meddling in the jurisdictional negotiation between HR professionals and line managers. In knowledge-based organizations, the conflict assumed to exist between bureaucratic and professional approaches to controlling work may be supplanted by the conflict posed by the demands of undesirable roles or responsibilities in light of the work domains that professionals increasingly seek to control. Instead

of bureaucratic encroachment on professional autonomy, the prevailing problem that embedded professionals face today might be securing support and resources from the organization for the advancement of their professional aspirations.

### **Limitations and Future Directions**

Any study of a single profession in two similar settings is limited in its generalizability. We note two caveats here. First, since the 1970s, HR's jurisdiction has included ensuring organizational compliance with employment regulation (Dobbin 2009, Edelman 2016). HR professionals thus mediate between their internal clients (i.e., employees and managers) and key actors in the organization's institutional environment (i.e., regulatory agencies). Because HR has difficulty dissociating itself from this institutional element of its jurisdiction, its attempted shift is hindered (Sandholtz and Burrows 2016). More generally, we acknowledge that the nature of an embedded profession's relationship to the organization's institutional environment likely affects the profession's ability to shift jurisdictions. Further research is needed to examine jurisdictional shifts in professions that are equally embedded organizationally, but vary with respect to their institutional embeddedness.

Second, and more important, our study examines a gendered profession that enjoys only modest professional status. Ashcraft (2013) and others convincingly argue that race and gender, when associated with the majority of the members of a profession, become generalized to the profession. Regarding the professional pecking order, Zhou (2005, p. 130) provides evidence that "those occupations whose work is salient in their 'science and technical nature' tend to receive higher prestige than those occupations that are less salient in this respect." Both of these caveats apply to HR. Not only HR is a gendered profession, but its expertise is not grounded in science or technology. These factors surely contribute to Jacoby's (2004) observation that, after a golden age in the 1950s, the HR profession has slowly lost its prestige, becoming less influential in corporate affairs.

Although our study was not designed to observe the effect of gender or professional prestige on the ability to shift jurisdictions, we are aware that such status-related factors may have intensified our findings.

Any status differential could conceivably contribute to the condition of jurisdictional entrenchment. Lower-status professionals will be more likely to experience challenges to their shift attempts, which may motivate them to more vigorously assert and defend claims to jurisdiction in domains where they feel comparatively advantaged or less vulnerable. Their ability to defend these domains becomes associated with their professional identity, leading to greater entrenchment, and so on in a self-reinforcing cycle. Additional research is needed, however, to more systematically explore the relationship between various occupational status markers and the processes of jurisdictional maintenance and change.

## **CONCLUSION**

Half a century ago, Wilensky (1964) famously asked whether contemporary society was headed toward the professionalization of everyone. In the intervening years, we have witnessed a dramatic rise in organizational dominance (Bromley and Meyer 2017), to the point that many professionals now ply their trade almost exclusively within complex organizations. Given this change in the professional landscape, the dynamics through which professional jurisdictions change – the growing, shrinking, and shifting of jurisdictional boundaries in organizations – is of particular importance to a robust theory of professional work (Abbott 1988, Hughes 1971, Muzio et al. 2013). Society may have reached a tipping point at which the relationship between professionals and their tasks is determined more by intra-organizational, client-based dynamics than by field-level, inter-professional relationships. Hence, to understand evolving professional aspirations, we need to pay more attention to the jurisdictional affordances and constraints posed by organizational embeddedness, and develop a more nuanced view of jurisdictional entrenchment.

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**TABLES**

**Table 1: Characteristics of the Companies and HR Departments Studied**

<b>Similarities</b>	<b>Digicorp</b>	<b>Technocorp</b>
Location of headquarters	US	US
US employment (parent)	X*	1.4X
Approx. US employment (division studied)	7,000	7,000
% of 2011 profits contributed by division studied	50%	40%
Primary product	High-tech components sold to OEMs	
Percentage of workforce trained as engineers	84%	83%
Reaction to 2008 economic downturn	Avoided layoffs through hiring freezes	
Gender composition of HR (% female)	69%	68%
Average tenure of HR (years)	7.15	7.57
<b>Differences</b>		
HR-to-employee ratio	1:56	1:158
Went through “strategic HR” reorganization	No	Yes

Note: Descriptions of the two companies are necessarily vague to disguise their identities.

\*X represents the number of employees at Digicorp.

**Table 2: Non-HR Interviews by Company and Respondent Type**

	<b>Digicorp</b>	<b>Technocorp</b>
Non-manager	8	9
Supervisor/Manager	8	8
Director	4	3
VP	3	4
<b>Total</b>	<b>23</b>	<b>24</b>

**Table 3: HR Generalists' Interaction Episodes by Organization and Interaction Partner**

	Digicorp	Technocorp	Total
Total number of all activity episodes	763	822	1,585
Total number of <b>interaction</b> episodes	459	441	900
Number (%) of <b>interaction</b> episodes with:			
– Fellow HR staff	249 (54)	245 (56)	
– Line managers	134 (29)	165 (37)	
– Employees	41 (9)	22 (5)	
– Others	35 (8)	9 (2)	
Total number of non-interaction episodes	304	381	685

**Table 4: Clients' negative comments about HR, by research site and job level**

	Digicorp (n = 23)	Technocorp (n = 24)
Clients interviewed who made negative comments on HR	21	23
Average number of negative comments per client	3.9	4
Clients who commented on employee abandonment by HR	5	16
<i>Rank-and-file</i>	3	7
<i>Manager</i>	2	4
<i>Director</i>	0	3
<i>VP</i>	0	2

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<sup>i</sup> For a full history of HR, see Jacoby (2004) and Kaufman (2008).

<sup>ii</sup> Interview questions included the following: What adds the most value in what you do (e.g., the highlight of your work this year)? Why does HR exist? What would happen if HR weren't there? What areas of responsibility are unique to HR? Whom does HR primarily serve? A complete interview protocol is available from the authors.

<sup>iii</sup> At Digicorp, the professionals willingly functioned as line managers' proxies for conducting menial HRIS transactions; they referred to this common practice as "impersonating" a manager. At Technocorp, HR professionals made a conscious choice to avoid impersonation. As an HR director explained, "It [impersonation] would turn us into the managers' admins," which was antithetical to HR's goal of becoming internal consultants. In both organizations, then, executing HRIS transactions was seen as scut work, embraced by Digicorp HR professionals and shunned by Technocorp's HR professionals. Because the consequences of such choices have been explored in prior research (Huisin 2015), we focus on the two areas of HR's jurisdiction where the interplay of entrenchment and shift were most evident in the contrast between the two research sites.