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Let me level with you: Brokerage work in the translation of management concepts

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ABSTRACT

Translation studies increasingly foreground the significance of local actors as agentic translators. Drawing on a brokerage work perspective, this article seeks to advance our understanding of managerial agents as translators by examining how and why these may vary in their role as intermediary or ‘strategic third’, and how these roles are associated with different patterns of translation. Examining qualitative data from a study of individuals tasked with implementing Lean in hospital contexts, we identify three brokerage modes of translation these actors may engage in (stretching, shielding and synthesizing), their main conditions, and the specific translation tactics they use within these modes (positioning, labeling and channeling). Our study extends our understanding of micro-level translation and reveals that purposeful ‘misalignment’ may be a significant and under-theorized part of the translation process.

1. Introduction

During the last two decades, there has been growing academic interest in the flow of management concepts. This critical interest has developed into a substantial body of literature with a broad range of studies on their emergence and prevalence (Abrahamson, 1996; Birkinshaw, Hamel, & Mol, 2008; Guillén, 1994; Mueller & Carter, 2005). An increasing number of studies focus on explaining how and why management concepts are adapted to new local settings and become modified along the way (Ansari, Fiss, & Zajac, 2010; Heusinkveld, Benders, & Hillebrand, 2013). Working in the tradition of Scandinavian institutionalism, this field of research has substantially furthered our insight into the central processes and conditions associated with how concepts are translated into specific organizational contexts (e.g., Boxenbaum & Strandgaard Pedersen, 2009; Canato et al., 2013; Czarniawska & Sevón, 1996; Gond & Boxenbaum, 2013; Kelemen, 2000; Morris & Lancaster, 2006; Özen & Berkman, 2007; Zilber, 2006).

In explaining how concepts are translated and made meaningful locally, theorists in this tradition increasingly focus on the role of specific organizational actors in shaping the intra-organizational processes that transform abstract concepts into practice (Reay et al., 2013, p. 964; see also Ansari, Reinecke, & Spaan, 2014; McCabe & Russell, 2017; Mueller & Whittle, 2011). Here, we find research attention to actors who

fulfill a complex ‘change intermediary’ (Balogun, 2003) position during implementation. Because of their organizationally central positions (Balogun & Johnson, 2005; Harding, Lee & Ford, 2014), ‘translators’ in the form of project managers, implementation managers and middle managers have recently been studied intensively from the perspective of translation theory (Outila et al., 2020; Radaelli & Sitton-Kent, 2016). Critically, while these studies have significantly advanced our understanding of the multiple micro-practices intermediary actors may use to move new ideas ‘from here to there’ (Radaelli & Sitton-Kent, 2016, p. 15), research on their agency in the translation of management concepts has typically offered limited insights into how these actors may vary their translator roles in relation to how they organize the adaptation of ideas within organizations, leaving questions unanswered as to how they may “tactically approach idea variation” from their unique position (Radaelli & Sitton-Kent, 2016, p. 15). Moreover, and related, we argue that an implicit linear conceptualization of the translation process may have limited an adequate view of the agency of intermediary actors in shaping organizational level translations. Notably at variance with field level studies, which direct attention to the multidirectional traveling of ideas, organizational-level translation research typically portrays intermediary actors as translating agents against an understanding of translation as the “transformation of ideas accepted at the organizational level (i.e., accepted by top management). into front-line practice”

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(Reay et al., 2013, p. 964) thereby avoiding necessary consideration of the role complexity of translating agents as well as how this may impact the translation process. As such, we contend that a more sophisticated understanding of the agency of intermediary actors would advance our understanding of intra-organizational translation.

In seeking to address these issues, we adopt a brokerage work perspective, allowing us to develop our understanding of how actors in intermediary positions might shape the way their roles are enacted in practice. Here, theorists focusing on brokerage work (Obstfeld, Borgatti, & Davis, 2014) have emphasized the significance of studying how people in specific social positions might vary their roles and the conditions under which they draw on various strategies and their implications for knowledge flows (Kellogg, 2014; Lingo & O'Mahony, 2010; Shi, Markoczy, & Dess, 2009). As such our research question is: *How do key intermediary actors variably deploy their organizationally central position to impact patterns of translation between hierarchically disconnected parties?*

Drawing on forty interviews with key intermediary actors championing the implementation of 'Lean' in a hospital setting, we develop a theoretical model of brokerage work in the translation of management concepts. Our study identifies three general translation tactics (positioning, labeling and channeling) through which implementation managers intermediate between hierarchically disconnected parties and shape the translation of management concepts. We show how these translation tactics are specified in relation to three different brokerage modes as agents leverage their social position as 'idea carriers.'

This study contributes to the extant literature in three ways. First, our study further develops our understanding of patterns of translation by showing that concepts are not simply edited to 'fit' a local context, but that the use of translation tactics is strongly related to how key intermediary actors shape their social positions in this context. Second, our model suggests that by connecting or disconnecting interaction and interpretations between hierarchically disconnected parties intermediary actors may shape the direction of translation through three brokerage modes of translation. This insight contrasts with the agency of intermediary actors in previous research, which has been conceptualized in relation to a primarily linear understanding of the translation process. Third, our study shows how actors pursuing misalignment - through 'shielding' between high-level management and front-line professionals - needs to be considered as a significant and under-theorized part of the translation process.

2. Agency in translation

The last two decades exhibit an increasing academic interest in the flow of management concepts and their impact on people, organizations, and society (Birkinshaw, Hamel, & Mol, 2008; Mueller & Carter, 2005; Nicolai & Dautwiz, 2010; Reay et al., 2013). In the last twenty years, a 'translation' model has become widely used in management and organization studies to help explain "how apparently isomorphic organizational forms become heterogeneous when implemented in practice in different organizational contexts" (Boxenbaum & Strandgaard Pedersen (2009), p. 191). Working in the tradition of Scandinavian institutionalism, translation scholars examined the transformation of ideas from one context to another and the interpretive processes through which they are adapted, edited, or translated into practice (e.g., Boxenbaum & Strandgaard Pedersen, 2009; Canato et al., (2013); Czarniawska & Sevón, 1996; Gond & Boxenbaum, 2013; Heusinkveld et al., 2013; Kelemen, 2000; Morris & Lancaster, 2006; Zilber, 2006). Scholars in this tradition have shown a continued and growing interest in the "intra-organizational processes through which traveling ideas are implemented" (Nielsen, Mathiassen, & Newell, 2021, p. 4; see also Vossen and van Gestel (2019); p. 27), concentrating on how, within adopting organizations, "macro" ideas are being "reshaped through efforts to align [them] with existing conditions and interests" (Hultin, Introna, & Mähring 2021, p. 588). Research in this area has highlighted the significance of local actors, foregrounding their agency as active,

intentional, and strategic in shaping ideas to their local contexts (Hultin et al., 2021; Spyridonidis et al., 2016; Teulier & Rouleau, 2013).

Against this background, the translational work of intermediary actors has started to receive significant study over the years (Spyridonidis et al., 2016). Going beyond a focus on executive managers, others - holding roles at the intermediate levels of the corporate hierarchy (e.g., project managers, procurement professionals, 'hybrid' nurse managers and middle level managers) - have been increasingly recognized as impacting translational processes and we find an increasing number of "systematic attempts to investigate their activity explicitly from the perspective of translation theory" (e.g., Radaelli & Sitton-Kent, 2016, p. 2; Teulier & Rouleau, 2013). Because of these actors' recognized central positions at the intermediate level of the corporate hierarchy (Balogun & Johnson, 2005; Harding et al., 2014), studies have sought to address the multiple micro-practices they use to move new ideas 'from here to there', with a focus on the persuasive narratives and discourses they draw on when they are performing their role of translators across organizational boundaries (Radaelli & Sitton-Kent, 2016, p. 15). Indeed, in their review of the existing literature on middle managers' engagement with the translation of ideas, Radaelli and Sitton-Kent (2016) identify that translation is not limited to small segments of the translation process but is rather a key function characterizing the middle manager's organizational role. In all, these studies have elevated intermediary actors - or 'change intermediaries' (Balogun, 2003) - from being previously understudied actors, to having a "strategic role. as translators between heterogeneous stakeholders" (Fauré & Rouleau, 2011, p. 180). This has significantly advanced our understanding of the interpretive processes through which ideas and concepts get modified within a variety of organizational contexts. Yet, we argue there is still significant scope for development.

This study's first concern regards research on intermediary actors in the translation of management concepts and its typically limited insights into how the adaptation of ideas within organizations may vary with their translator roles. This is remarkable as there is a strong notion in translation research that translations are rule-based activities, with many studies trying to explain patterns of variations in the application of such rules (Røvik, 2016; cf. Røvik 1996; Wæraas & Sataøen 2014). Based on these patterns, adaptations would enable a construct to 'fit' into local recipient contexts (Morris and Lancaster, 2006). In particular, one such set of 'rules' was introduced by Sahlin-Andersson (1996), who suggested that patterns of translation are linked to the way "different contexts provide different editing rules" (Sahlin & Wedlin, 2008, p. 226; see also Kirkpatrick et al., 2013). She argues the translation process is governed by three types of 'editing rules': those concerning context, logic, and formulation rules (see also Sahlin & Wedlin, 2008). These are not "explicit rules to follow" but are seen as "ways in which the local institutional context constrains the activities of the translators" (Westney & Piekkari, 2020, p. 61). This idea has been used extensively to understand how ideas and concepts become embedded in new localities and how adapting rules shapes and varies potentials for individual agency (Kirkpatrick et al., 2013). Researchers have expanded on this framework mostly by studying how editing rules, "guiding the process of translation," are operationalized into specific editing practices (Teulier & Rouleau, 2013); change interventions (Helin & Sandström, 2010; Morris & Lancaster, 2006) and ways to impact readiness for change (Øygarden & Mikkelsen, 2020). In this regard, agency of intermediary actors tends to be seen in undifferentiated terms and is primarily related to their ability to 'operationalize into context' or 'put into practice' with little analysis of how they "tactically approach idea variation" from their unique position (Radaelli & Sitton-Kent, 2016, p. 15). As such, our research seeks to extend this work by providing more insight into how the translator roles of intermediary actors may vary and how this variety impacts on idea variation.

A second concern is that agency of intermediary actors appears implicitly conceptualized in relation to a linear understanding of the organizational translation process. This conceptualization is reflected in

a primary focus on how “higher-level meanings are continually refined and modified as they are moved to lower levels” (Reay et al., 2013, p. 983; see also Zilber, 2006), foregrounding “local managers’ translation of macro-ideas into micro-level practices” (Vossen & van Gestel (2019), p. 27) sometimes even explicitly attributing high-level modes of translation to upper management and low-level modes of translation to lower-level managers and front-line employees respectively (Linneberg, Madsen & Nielsen, 2019). We find this logic present in various studies in different contexts, centralizing intermediary actors as translators: from international to national levels (Mennicken, 2008); from institutional logics to enactment in (governmental) organizational contexts (Pallas, Fredriksson, & Wedlin, 2016); from policy levels into sets of specific workplace practices (Linneberg et al., 2019; Morris and Lancaster, 2006); from corporate, multinational levels to local subsidiaries (Ansari et al., 2014; Ciuk and James (2015)), and from the organizational to the individual level (Reay et al., 2013). The view of organizational idea traveling present in these studies is at odds with field-level studies, which draw on ‘translation ecology,’ a notion that has recently gained traction among translation scholars (Nielsen et al., 2021; Westney & Piekkari, 2020) moving away from thinking about idea translation “as a one-way movement into organizations” (Nielsen et al., 2021, p. 4). Translation ecology, proposed by Wedlin and Sahlin (2017), points to the importance of analyzing the interactions between translators, translations, and translation processes over time, spurring scholars to explore the multidirectional traveling of ideas (Nielsen et al., 2021) and the ‘reverse flow’ of models and practices and the interactions between translators over time (Westney & Piekkari, 2020). Despite recognition that translation may take multiple forms for intermediary actors and may proceed in different directions – upward, laterally or downwards – (Radaelli & Sitton-Kent, 2016, p. 3), scholars interested in the “intra-organizational processes through which traveling ideas are implemented” (Nielsen et al., 2021 p. 4) still tend to portray idea traveling in the linear terms of chronology, hierarchy, and abstraction. We argue this lack of attention to and possible under-conceptualization of multi-directionality in relation to the translation role of intermediary actors limits an adequate view of the micro-level practices through which ideas are translated, as well as the role of intermediary actors’ transformative agency in this regard.

Accordingly, to address these limitations, we pursue a brokerage work perspective (Obstfeld et al., 2014) sensitive to the different ways intermediary actors establish knowledge sharing between actors that differ in their orientations and interests and consider their implications for knowledge flows (Kellogg, 2014; Shi, Markoczy, & Dess, 2009).

3. Studying brokerage work

Brokerage is widely conceptualized in terms of a socially structured position by which the flow of resources, information, or knowledge is mediated between parties otherwise separated by location, hierarchy, or function (Burt, 1995). Network perspectives on brokerage show how brokers’ unique (tertius) position in organizations allows them to occupy different linkage roles and shape the interaction between other actors who may vary in their primary goals and expectations (Shi, Markoczy, & Dess, 2009). Moving away from the network perspective focusing on the structural advantages associated with a broker’s unique access to information and contacts, studies on brokerage work take a more activity-based perspective on the enactment of brokerage roles (e. g., Lingo & O’Mahony, 2010, Obstfeld et al., 2014, Endacott & Leonardi, 2022). These studies emphasize the significance of studying the processes that play a role in how the advantages related to brokerage positions can be put to creative use (Lingo & O’Mahony, 2010). Studies drawing on brokerage work have revealed how agents’ dynamic brokering practices play a critical role in shaping the interaction and related patterns of knowledge flows between separated groups across professional and managerial boundaries. In building on the concepts of ‘tertius iungens’ and ‘tertius gaudens,’ these studies show how brokers

can vary in how they engage interactional boundary constructions thereby either facilitating or controlling the knowledge flows between parties (Obstfeld et al., 2014). Tertius iungens denotes ‘a third who unites’ and is associated with a ‘union strategy’ through which a third party takes the role of “bring[ing] certain people together” (Lingo & O’Mahony, 2010, p. 58). In contrast, tertius gaudens, denotes ‘a third who gains’ and reflects a strategy of disunion through which individuals may gain from maintaining a separation among parties (Lingo & O’Mahony, 2010, p. 58; Kaplan, Milde, & Cowan, 2017; Obstfeld et al., 2014). Whereas the latter approach implies benefits for the broker, research shows tertius gaudens strategies can also benefit the collective. For example, bracketing parties from each other’s process may allow them to experiment outside their comfort zone (Lingo & O’Mahony, 2010). Collectively, these studies offer an understanding of the specific “tactics real socially skilled actors use to induce cooperation” (Fligstein, 2001, p. 113) between otherwise separated individuals and groups.

This line of work on brokerage work not only shows how brokers’ use their social positions in different ways for strategic leverage but also foregrounds the conditions under which their connecting or buffering practices are the preferred means for collective progress (Obstfeld et al., 2014; Lingo & O’Mahony, 2010; Kellogg, 2014; Balogun & Johnson, 2005; Kaplan et al., 2017). Research has emphasized how a broker’s role in shaping the interaction between separated parties is systematically associated with and may shift according to the nature of tasks across boundaries (Lingo & O’Mahony, 2010). Depending on the complexity, ambiguity, or novelty of such tasks, brokers may sometimes protect competing visions from impeding the flow of ideas, sometimes relating and integrating them (Pawlowski & Robey (2004)). This also implies that brokers may draw on multiple strategies, as Obstfeld et al. concluded: “these emerging examples demonstrate how effective brokerage strategies may require complex combinations and sequences of different brokerage behaviors over time” (2014, p. 150).

This view of ‘a strategic third’ (tertius) suggests that to develop a more advanced understanding of how and why new concepts and practices are translated in an organizational context, it is crucial to examine how, and why key intermediary actors influence organizational interaction and its implications for knowledge flows. Thus, this study aims to answer the question: How do key intermediary actors variably deploy their organizationally central position to impact patterns of translation between hierarchically disconnected parties?

4. Method

4.1. Research setting

To investigate the role of key intermediary actors in translating concepts between hierarchically disconnected parties, we explored the implementation of ‘Lean management’ (hereafter ‘Lean’) in Dutch healthcare. We focused on Lean as it represents a popular management concept providing guidelines on improving management under a specific label (cf. Benders & Veen (2001)). Lean is generally associated with process improvement, maximization of customer value, and eliminating wasteful activities through continuous improvement and radical improvement activities (Womack, Jones, & Roos, 1990). Lean can be traced back to the Japanese automotive industry, where the concept was developed to improve the production system of vehicle assembly at Toyota Motor Corporation (Holweg, 2007; Ohno, 1988).

The seemingly universal relevance of the concept allowed Lean to spread beyond manufacturing into services (Morris & Lancaster, 2006). In recent years, Lean has been widely promoted to ‘revolutionize’ healthcare, yielding a strong practitioner and academic interest (e.g., Eaton & Phillips, 2008; Graban, 2008; McCann et al., 2015; Radnor, Holweg & Waring, 2012). This broad body of literature on the translation and implementation of Lean in different contexts has recognized some ambivalence to the implementation of Lean (eg. Zanoni, 2011), with authors contextualizing Lean as a progressive solution for

efficiency and well-being issues (Liker, 2004), denouncing its increasing work intensification (Hassard, McCann, & Morris, 2009) and rigid formalization (Delbridge, Lowe, & Oliver, 2000).

Given the substantial differences between the healthcare sector and the car industry where Lean was pioneered (cf. Womack et al., 1990; Morris & Lancaster, 2006) and the varied interpretations and mobilizations of the concept, significant agentic efforts can be expected to adapt Lean to the specifics of this context. Additionally, we consider hospitals as theoretically relevant settings for studying the brokering role of intermediary actors because of the more or less privileged position of medical professionals, which makes imposing change based on hierarchical position, resource control, or expert knowledge less likely (Currie et al., 2012; Ferlie et al., 2005; Kellogg, 2014). Another consideration for choosing this context stemmed from the formation of a national network of healthcare institutions in 2011 (LIDZ – Lean in Healthcare). This network was created around the experiences with Lean in several pioneering hospitals which allowed us to research change agents' with relatively comparable Lean experiences concerning its contextual origins. At the time of the study (2014–16), a total of 57 Dutch healthcare organizations had joined the network, of which 37 were hospitals.

4.2. Data collection

Our primary source of data consisted of 46 semi-structured retrospective interviews. Of these, forty interviews were held with 42 implementation managers in the 37 hospitals of the LIDZ network (see Table 1). Whereas we regard these implementation managers as intermediary actors, the term is to be understood rather broadly here, as we use it to denote individuals with a broad range of job titles. However, all our interviewees occupy a position in their organizational hierarchies 'between the operating core and the apex' (eg. Harding et al., 2014, p. 1214). Therefore, these individuals constitute a unique community of people and theoretically relevant informants to study the role of intermediary actors and to identify patterns in their practices towards the translation of Lean between hierarchically disconnected parties (cf. Balogun & Johnson, 2005).

The LIDZ network provided contact information for these theoretically relevant informants, and we used it to send them an invitation to participate in our study. If informants indicated having a predecessor or current colleague with a similar role, we invited them to be interviewed as well. At three sites (hospitals 2, 3, and 8), we conducted two separate interviews. At two sites (hospitals 11 and 26), the first author interviewed role sharers in a joint interview. To gain a better sense of field-level dynamics at the LIDZ network and invite comments on our nascent findings, we conducted six additional interviews with individuals who had played an active role in developing the network. We conducted all interviews within a year and a half (July 2014 - January 2016).

Most informants had been with the organization from the initial introduction of Lean and were, therefore, expected to provide a rich account of its development. The Lean principles were central to their practices and their membership in the LIDZ network. All had a formal role in championing the implementation of Lean in their hospitals and were in direct contact with both high-level managers and front-line medical professionals, such as nurses, doctors, and physician assistants. The informants varied in staff positions, educational backgrounds, tenure, and age. Furthermore, the hospitals differed as the network spanned general and specialist hospitals, university medical centers, and Top-Clinical Centers (TCC). Additionally, we were provided with self-assigned indications of the development of Lean for all of the hospitals in the network. These rankings were not necessarily objective, but revealed variations in perceived stages of development and facilitated the identification of translation patterns (see Table 1 for an overview of the interview data). We used these rankings for further reflection during the interviews, which also revealed different patterns in where Lean was initiated as we observed perceptions of top-down and bottom-up first

initiatives.

All interviews followed the same semi-structured approach, which typically covered three main topics: (1) interviewees' personal backgrounds and experiences with Lean, (2) their perceptions of intra-organizational development and the actors involved, and (3) their interactions with other organizations and network representatives about implementing Lean. The interview structure remained the same during data collection; however, as interviewees foregrounded their social positions within their organizations regarding their translation efforts, we developed a stronger sensitivity to their accounts of intra-organizational interaction and interpretation of translating Lean. This entailed gradually giving more attention to the initial topics 1 and 2, which allowed us to ask more detailed questions on topics such as their social position in the organization, the involvement of internal stakeholders, the role of management and professionals, tensions between managerial and professional initiatives, and perceived differences in the considerations and legitimations for adopting Lean.

4.3. Data analysis

Our analysis focused primarily on implementation managers' brokers role in translating management concepts. In particular we concentrated on how they variably deploy their organizationally central position in constructing the concept of Lean between hierarchically disconnected parties. To this end, we followed an abductive research design, iterating between our data and extant literature (Ketoviki & Mantere (2010)) drawing on established guidelines for developing grounded theory (Gioia, Corley, & Hamilton, 2013). Our analysis proceeded in three stages.

First, after an initial review of the data, we open coded (Strauss & Corbin, 1990) the interview transcripts for the activities, practices and strategies intermediary actors engage between hierarchically disconnected parties in implementing Lean. In developing our first-order codes, we maintained 'informant-centric' or 'in vivo' terms (Gioia et al., 2013, p. 18) to label our empirical material and captured important ways in which informants construct the concept of Lean in relation to hierarchically disconnected parties. For example, these codes included descriptions of these actors 'withholding Lean productivity data from above' and as 'Juggling 'Lean as a philosophy' with 'Lean as a business case'' and 'Connecting bottom-up and top-down (Lean) movements'. Based on our open coding, a list of categories (Lean constructions) emerged.

In our second coding stage, we sought to explore and specify patterns in how intermediary actors described their efforts to leverage their position between hierarchically disconnected parties (as a 'strategic' third). Building from our initial first-order categories, we coded for patterns and emerging connections between them. We conducted second-order or axial coding (Strauss & Corbin, 1990) by going back and forth between the literature on knowledge brokerage work and translation theory and our empirical data, which yielded *three sets of translation tactics*, we labeled 'positioning,' 'labeling,' and 'channeling.' From our data, we further identified two main conditions associated with intermediary actors' social position as 'idea carriers': (1) exposure to and experience with the concept and (2) compatibility of (underlying) meanings and interests. Regarding these conditions, we observed that agents would variably deploy specific *translation tactics* to either 'connect' or 'disconnect' the interaction and interpretation around Lean's implementation.

In the third stage, we engaged in a further analysis of the connections between conditions and *translation tactics*, which helped us identify three *brokerage modes of translation*. We define the latter as a manner of deploying translation tactics between hierarchically disconnected parties that can be favored and actively employed by agents prompted by their relative brokerage position. We eventually settled on three *brokerage modes of translation* designated 'stretching,' 'shielding,' and 'synthesizing.' Fig. 1 displays the data structure that emerged from our

Table 1
Overview of interviews.

No. Interview	Interviewee	Job title (translated)	Gender	Age	Educational Background	Hospital	Type of hospital ^a	#Beds ^b	#Employees ^b	'Lean phase' ^c	Lean 'approach' ^a
I	1	Senior Consultant Lean	f	35–40	Industrial Engineering	1	General hospital (TCC)	942	6147	3	Lean
II	2	Consultant Process improvement & innovation	m	55–60	Health Sciences, Change management	2	UMC	953	8607	2	Lean
III	3	Manager Lean	m	25–30	Business Economics	3	Specialist hospital	-	265	3	Lean
IV	4	Consultant, Lean coach	f	45–50	Nursing, Business Economics	4	UMC	733	6554	2	Lean
V	5	Manager Lean & care logistics, Chairman LIDZ	m	35–40	Business Administration	5	General hospital (TCC)	848	4533	2	Lean
VI	6	Manager innovation	m	60–65	Healthcare	6	Specialist hospital	-	293	1	Lean
VII	7	Consultant & Program manager OE	f	45–50	Educational Sciences & Technology	7	UMC	695	4960	4	OE/LeanSS
VIII	8	Manager care, Program manager care innovation	m	55–60	Business Administration	8	UMC	-	6628	1	Lean
IX	9	Program manager Streamlined working	f	35–40	Civil Engineering	9	General hospital (TCC)	667	3547	3	Lean
X	10	Lean coach	m	40–45	Healthcare, Business Administration	3	Specialist hospital	-	265	3	Lean
XI	11	Lean coach Program healthcare innovation	m	45–50	Nursing, Business Administration	8	UMC	N/A	6628	1	Lean
XII	12	Program leader Lean Quality & process innovation	f	30–35	Public Governance	10	UMC	1002	6234	2	Lean/ LeanSS
XIII	13	†Project manager Lean/Trainer Lean Six Sigma	m	30–35	Nursing, Healthcare management	11	General hospital (TCC)	455	2615	3	LeanSS
XIII(2)	14	Project manager Lean SS, Lean coach & Trainer	f	40–45	Nursing	11	General hospital (TCC)	455	2615	3	LeanSS
XIV	15	Manager ward, TOC consultant	f	40–45	Management	12	General hospital	255	788	2	TOC
XV	16	Innovation coach, care group management	m	40–45	Logistics management	13	General hospital (TCC)	824	4218	3	PW
XVI	17	Head healthcare logistics	f	40–45	Industrial Engineering	14	Specialist hospital	251	1594	1	Care logistics/ Lean Lean/ LeanSS
XVII	18	Program leader Lean	f	40–45	Speech & language therapy, MBA	15	General hospital	294	1870	1	Lean/ LeanSS
XVIII	19	Manager Innovation & Quality, Program manager	f	40–45	Health Sciences	16	General hospital	293	1266	1	Lean
XIX	20	Consultant Care Innovation	f	45–50	Nursing, Management	17	General hospital	646	3152	2	PW
XX	21	Process coordinator, Lean manager	f	45–50	Management assistant, Project management	2	UMC	953	8607	2	Lean
XXI	22	Senior consultant	f	35–40	Business Engineering	18	General hospital (TCC)	627	3467	3	Lean
XXII	23	Senior policy officer	f	30–35	Medical informatics, Healthcare management	19	UMC	1042	10,366	2	OE/LeanSS
XXIII	24	Consultant Consultancy & Policy	f	55–60	Nursing, Management courses	20	General hospital	808	3793	1	Lean
XXIV	25	Program manager Lean	f	50–55	Occupational therapy, Healthcare management	21	General hospital (TCC)	955	5229	1	Lean

(continued on next page)

Table 1 (continued)

No. Interview	Interviewee	Job title (translated)	Gender	Age	Educational Background	Hospital	Type of hospital ^a	#Beds ^b	#Employees ^b	'Lean phase' ^c	Lean 'approach' ^a
XXV	26	Consultant Staff department Quality & Safety	f	40–45	Health Sciences	22	General hospital (TCC)	683	3649	2	Lean
XXVI	27	Lean consultant, Head of unit	f	45–50	Health Sciences	23	UMC	1320	10,510	2	Lean
XXVII	28	Quality manager	f	40–45	Food technology, Consumer Studies	24	General hospital	499	2782	2	Lean
XXVIII	29	Staff member Quality & Safety - LeanSS	m	45–50	Physiotherapy	25	General hospital	500	2353	1	PW/LeanSS
XXIX	30	Program manager	f	25–30	Health Sciences	26	General hospital	341	2158	1	PW/Lean
XXIX(2)	31	Policy officer, Official secretary	f	50–55	Nursing, management courses	26	General hospital	341	2158	1	PW/Lean
XXX	32	Team leader, Project manager Lean	f	30–35	Nursing	27	General hospital	N/A	5646	N/A	Lean
XXXI	33	Program manager, Coach, Trainer	m	50–55	Business Administration	28	General hospital (TCC)	739	2889	2	LeanSS
XXXII	34	Program manager Care logistics	f	40–45	Industrial Engineering	29	General hospital	310	1662	1	Lean
XXXIII	35	Senior consultant, Lean coach	f	50–55	HTS, Business Engineering	30	General hospital (TCC)	493	2818	2	Lean/LeanSS
XXXIV	36	Head Quality & Safety	m	50–55	Psychology	31	General hospital	265	1315	1	Lean
XXXV	37	Coordinator Quality Assurance	m	40–45	Total Quality Management	32	General hospital (TCC)	1063	5953	2	Lean/LeanSS
XXXVI	38	Program manager Lean Six Sigma	f	40–45	Medicine & Life Sciences, Sociology	33	General hospital (TCC)	578	2949	3	LeanSS
XXXVII	39	Management Consultant	m	30–35	Health Sciences	34	UMC	986	10,389	2	LeanSS
XXXVIII	40	Head Policy & Organization - Lean coach	f	45–50	Nursing	35	General hospital	399	2278	3	Lean
XXXIX	41	Member board of directors	f	50–55	Economics	36	General hospital (TCC)	808	3793	1	Lean
XXXX	42	Strategic consultant Lean & Capacity management	m	30–35	Business Economics	37	General hospital	942	6147	1	Lean
XXXXI	5	Manager Lean & care logistics, Chairman LIDZ	m	35–40	Business Administration	-	-	-	-	-	-
XXXXII	43	Coordinator LIDZ network, Lean coach	f	35–40	Nutrition & Dietetics	-	-	-	-	-	-
XXXXIII	44	Consultant Lean (external)	m	-	-	-	-	-	-	-	-
XXXXIV	45	Consultant Lean (external)	m	-	-	-	-	-	-	-	-
XXXXV	46	Representative health insurance company	m	-	-	-	-	-	-	-	-
XXXXVI	47	Website Manager LIDZ network	m	-	-	-	-	-	-	-	-

Please note that, for reasons of anonymity, the order of interviews and interviewees in this table does not correspond to the in-text interviewee numbers.

^a TCC (= Top-Clinical Center), UMC (= University Medical Center), LeanSS (= Lean Six Sigma), OE (= Operational Excellence), PW (= Productive Ward), N/A (= Not Available)

^b Data on size hospitals (beds and employees) retrieved from Jaarverslagen Zorg 2015 (DIGIMV) (Annual reports Healthcare)

^c Self-assigned indications of the development of Lean in the hospitals, provided through the LIDZ-network

analysis of how implementation managers as key intermediary actors variably deploy their organizationally central position in constructing the concept of Lean between hierarchically disconnected parties, illustrating the first-order categories, the second-order themes, and the aggregate dimensions that served as the foundation for the conceptual model we turn to next.

5. Brokerage work in translation

Analyzing our data, we identified how the efforts of intermediary actors reflected sets of translation tactics - 'positioning,' 'labeling,' and 'channeling' - through which they invite and encourage organizational members to make sense of the challenges required in the translation of Lean. Furthermore, we found that the specification of these tactics is related to the social positions of key agents as 'idea carriers' in

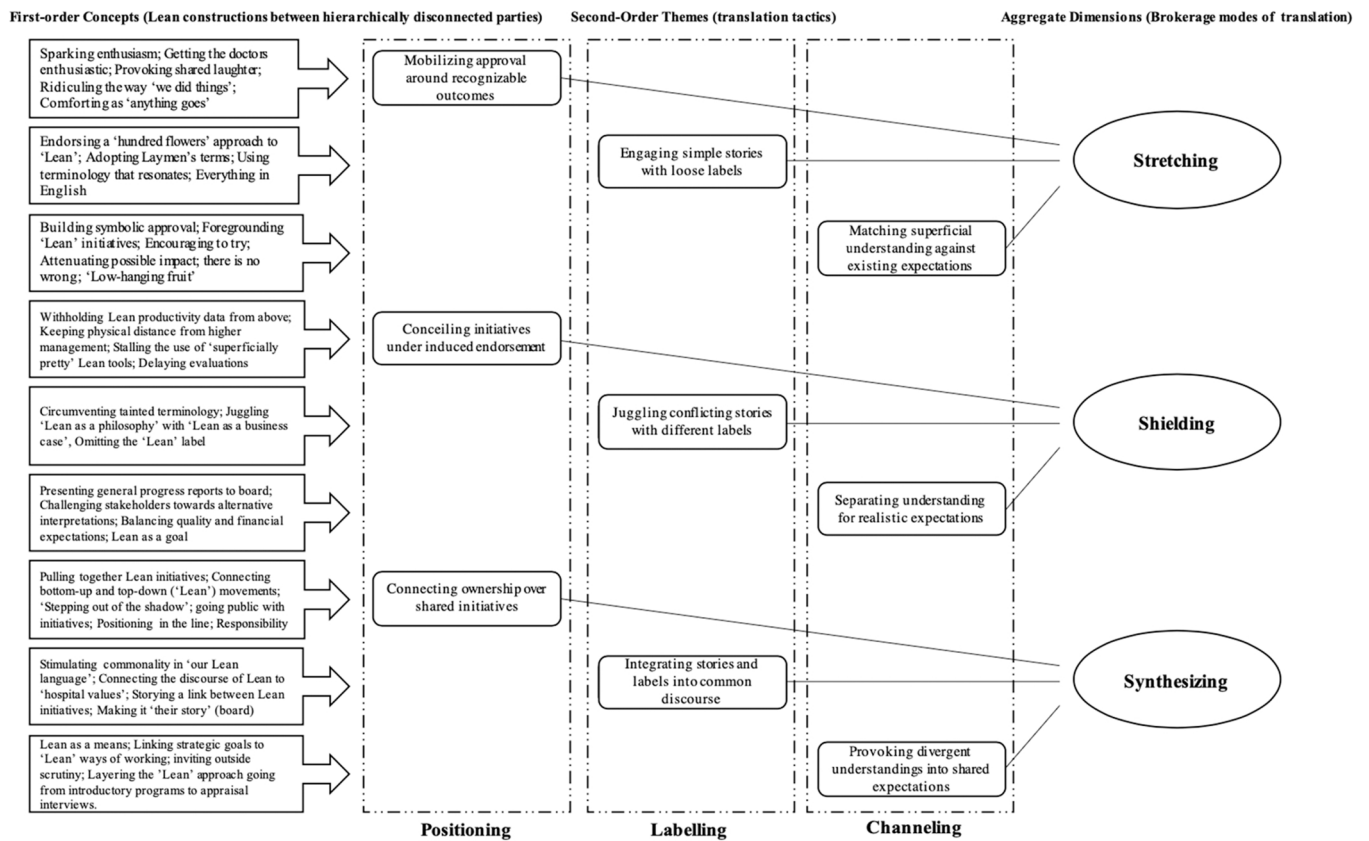


Fig. 1. Data coding structure.

stretching, shielding, and synthesizing modes. We have chosen to present our findings under these modes; however, we stress that despite their sequential description, they may best be viewed as patterns in which conditions and tactics interact and where shifts may also reflect iterations or 'backward steps.' In illustrating our findings, we incorporate quotes from our interviews (see Appendix I).

5.1. Stretching

When the concept of Lean is formally or informally introduced in the organization, different parties generally have no or limited experience with it. In terms of Lean's actual and envisioned application, interpretations are superficial, whereas interests are likely to be diverse. Parties have not significantly invested, nor can they distill confidence from successful applications. Under these conditions of initial *lenience*, we found that implementation managers engage significant efforts to ensure parties broadly support the concept and encourage further experimentation. To accomplish this, implementation managers (1)

positioned the concept by mobilizing approval around promising initiatives. They engaged in (2) loose labeling in simple stories to allow for seemingly similar interpretations. Also, they (3) channeled interpretations by matching superficial understanding against expectations. We called this mode 'stretching' as agents bring together higher-level management and front-line professionals around a superficial understanding of Lean without much reflection on what is needed from these parties in terms of their active involvement. We illustrate this mode with Fig. 2.

Mobilizing approval around simplicity and success (positioning) - Implementation managers told us how they invested heavily in getting parties to collectively approve the concept and persuaded them to say 'yes' to seemingly simple but successful initiatives. Lean tends to be positioned in the organization as a pilot under which the implementation managers may have some room for experimentation but limited formal authority. One informant explained how she aimed to do 'a lot with a little' to create enthusiasm for the concept: 'We have a little video clip in which we ask a nurse to collect all the things she needs for [a

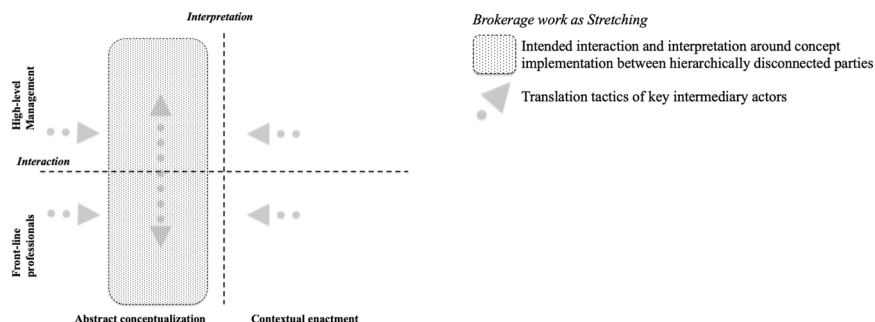


Fig. 2. Brokerage work as Stretching.

procedure]. You can't stop laughing because it will take her so much longer to look for all the stuff than to do [the procedure]. It is hilarious, and if you see that, you will think, 'what a waste,' and everybody will recognize it. That is how we get the doctors enthusiastic as well.' (Informant 9).

For this mode of stretching, our interviewees stressed the importance of bringing groups of people together around implementing Lean. They aimed to create and select successful in-house applications to advertise them as examples to others. One of our informants talked about how she made a book of problems collected by the participants of a Lean training she had initiated. The book indicated the potential of cases that participants had designed and served the purpose of formalizing the approval for these initiatives before actually going through the motions of having them become 'Lean' in a typical A3 format: 'We had a formal moment where I handed the book over to the Board: Well, these are the things that I will solve for you, and then four people have already presented their case with their slides. On [date], we have another day to which we have also invited the Executive Board, and all managers and medical managers and participants will be presenting their case on a poster. It does not have to be A3, but [a simple] structure. And then we hope that many cases have already had effects.' (Informant 16).

Engaging simple stories with loose labels (labeling) - Our informants suggested that simple stories with loose labels allowed them to unite higher-level management and front-line professionals. Multiple informants mentioned a 'hundred flowers' - approach through which they incorporated different initiatives in a change program in which different parties would recognize themselves. This entailed they would rally different 'flowers' under the program, which would then be 'fed' with terminology that would resonate with the initiatives and the departments but would also create some coherence under Lean: 'It is more a 'hundred flowers' approach [here], and people generally like that. So beautiful flowers that bloom, and they all call for fences around it water and sun, so we have to take care of that'. (Informant 34).

The labeling of the concept in this mode also reflects simplicity in defining the concept. By using loose labels in simple stories, we saw that managers tried to frame the concept as fairly straightforward to motivate different parties and not 'scare them off': '[Hospital X], how they are working on Lean and training having everything in English, and I think 'Wow, is this the purpose'? How do they get everyone on board? It's not laymen's speech at all, and I think it should be like that for the nursing departments, not to underestimate them in terms of general level, but in that [Lean] area, I mean.' (Informant 14).

Matching superficial understanding against existing expectations (channeling) - In stretching the concept between higher-level management and front-line professionals, implementation managers stressed the significance of foregrounding initiatives that would resonate with the expectations of different parties, framing these initiatives to create an apparent similarity in how the concept is understood and approved. One informant illustrated this by explaining how she initiated an event where Lean cases were pitched and to which she invited higher management and employees and encouraged them by making them symbolically 'approve' these cases using stickers: 'Each of these 60 people will get a sticker [to hand out], and the four presentations with the highest scores will be attended by the management team in a later round of presentations. I will also give the management team a sticker and tell them to give it to the presentation they thought was best. That also gives us a nice opportunity to put Lean in the spotlight. And it could very well be true that it is one of their cases, because the management team, the head of finance, the head of revalidation, had to approve the ideas and initiatives in the first place, so it is also in their interest that these people have a good presentation.' (Informant 16).

Yet, informants noted how they would also use these initiatives to show that Lean would address existing but divergent expectations. For example, one implementation manager how his pilot addresses both the time-saving expectations of nurses and the financial motives of management: 'We started with one department as a pilot to show what Lean can deliver, that is how we showed what it may prevent. We are not going to take

care of everything 100%, but to prevent missing out on stuff, nurses lose a lot of time with that. With these actions, we have decreased stock, and if restocking is done every two days, I don't have to have so much stock. That is a financial saving, which is, of course, a one-time thing, but it saves a lot of money. And when you can point that out, in any case, you will have their [management] support to continue.' (Informant 1).

5.2. Shielding

When some initial endorsement has been secured, and management and front-line professionals are directly or indirectly experiencing Lean, different parties develop their own applications and come to understand what implementing the concept entails. Conflicting interpretations and interests surface and reflect the complexity of actual practice rather than its abstractions. External challenges of interpretations and applications may be perceived as threats. Parties become invested in implementation because of the mobilization of (cognitive, emotional, and financial) resources. Under these conditions of *dissonance*, implementation managers engaged significant efforts to facilitate unhindered *interpretation* among parties. Such quasi-independence generates space for many experimental applications, which parties can make sense of freely. To accomplish this, implementation managers (1) positioned the concept by concealing initiatives under an induced endorsement. They stressed the significance of (2) juggling conflicting stories with different labels and (3) channeled interpretations by separating understanding for realistic expectations. We called this mode 'shielding' (see Fig. 3) as agents deliberately aimed to diminish the *interaction* between management and front-line professionals concerning the implementation of Lean to allow for conscious reflection on what Lean means to them in terms of active involvement concerning interpretations, efforts, and experiments.

Concealing initiatives under induced endorsement (positioning) - Informants expressed that mobilizing approval around simplicity and success often meant dealing with people who didn't know what they said yes to, giving leeway for implementation managers to proceed as they see fit, tending to position Lean in the organization as a program or a project. Our informants indicated that they employ practices aimed at inducing actual endorsements for Lean, going beyond formal involvement or superficial enthusiasm by showing how it may define people in terms of active involvement. For example, one informant indicated that after gaining initial approval for the implementation of Lean, he stalled things to make higher management reflect on what Lean would mean for their leadership in practice: 'For gaining a broad support base, you do also need a top-down structure. Yes, I think if, at the top of the organization, people say 'it is a nice trick for them [work floor], but not for me, it does not define me, and all I have to do is to provide financial support,' then it's dead in the water, I wouldn't do it like that. So, considering I have really been stalling things, I think the leadership aspect in Lean might be the most important aspect, so I have prevented us from starting too soon with continuous improvement and improvement boards and all these pretty visual things on the outside.' (Informant 34).

As implementation managers aspired for different parties to engage their interpretations, they simultaneously protected vulnerable initiatives from too much outside scrutiny as people were still experimenting with the concept, running into difficulties, and making mistakes. By concealing initiatives across organizational boundaries, informants facilitated conscious reflection on Lean. An informant explained how she intentionally kept her distance from her managers, concerned they would interfere with the results established in one of the departments: 'Initially, we started with some kind of production system, so we would be able to look at the standardization of work and how much time we spend on what ...? And that resulted in data that I did not share with my manager. I thought, if that comes out, that is not good. But it did provide a lot of insight, and we could work with it, but I never let that be known. I was afraid they would draw their conclusions and that there would be consequences.' (Informant 40).

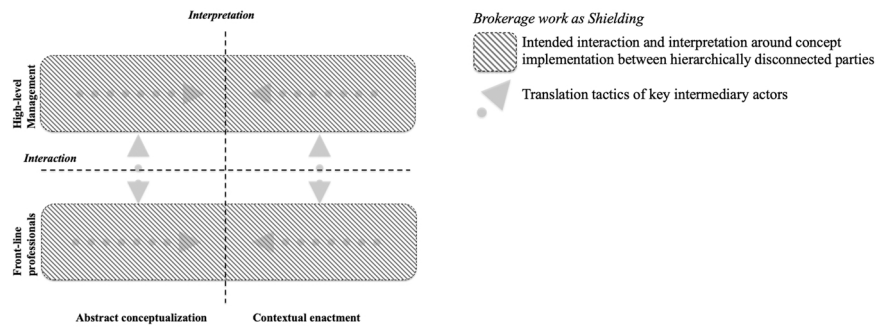


Fig. 3. Brokerage work as Shielding.

Juggling conflicting stories with tainted labels (labeling) - As our informants facilitate both parties to engage their own interpretation, allowing them to experiment with the concept and make sense of what Lean entails, we found that they were often confronted with tainted terminology. As different parties are starting to make the concept locally meaningful, some of the vocabulary appears problematic and does not correspond to 'the way we do things here.' We found that implementation managers chose their words carefully to avoid using poorly received labels: *'It's interesting because, on the one hand, he [member board of directors] is very enthusiastic, but, then again, I'm not calling it Lean because Lean is wrong apparently, and we shouldn't want that [irony]. What we do want is continuous improvement, so that is the word. And he was at a Kaizen event, at [one of the other departments], and then he is so thrilled about it. And then I think, 'well, that is Lean,' so it depends on how you approach him. Actually, he is 'Lean, no,' but in the meantime, it's a yes. And that [to use continuous improvement instead of Lean] to get the right response is alright; I don't mind.'* (Informant 22).

In facilitating different parties to develop their own interpretation of Lean, managers juggled conflicting storylines with their own logic to frame the concept as meaningful to diverging local applications. Our informants identified how they were juggling 'Lean as a philosophy' among front-line professionals and 'Lean as a business case' among the board of directors: *'Then it started to divert because the board of directors had not gotten that far yet. They were still saying, 'Lean is just a business case,' and when we went to the USA for the first time in. that is when the board of directors also started to change its mind. I was very schizophrenic before that when it diverted that much, but then they also started to understand. Lean is a philosophy, and if you want to do this properly, you should firmly root it in everything.'* (Informant 18). Similarly, another manager reported: *'We are really on our way to giving Lean a prominent role in our management philosophy, but in practice, it is still a parallel thing. We talk about continuous improvement, smarter ways of working and getting people in motion. But subsequently, it is all about the hard numbers, so it is still two worlds really. And for the board and all the managers, it is a search for how do we do this? How do we connect these two worlds?'* (Informant 27).

Separating understanding for realistic expectations (channeling) - In this shielding mode, managers aimed to establish conscious reflection among different parties through unhindered interpretation. They indicate the necessity of keeping various parties informed about the progress of others precisely to avoid further interference. Repeatedly, our informants described how they would inform their board of directors "afterward" through "fixed format progress reports." One of them reflected on the creation of this space in implementing the Lean program: *'Because actually... I was the only one to decide where the program was heading and what content it would have. And the previous program director never interfered with the contact in all the three years I worked with her. About what I put in the training material, how I organized and what themes I wanted to address. I did inform [the board of directors] about it, but I did that afterward. You know, so it's still a habit to report to the board of directors about the program's output. And we just do that in a PowerPoint presentation, not in extensive reports. They will just get ten slides, and that's what it*

is.' (Informant 37).

Informants noted that in this shielding mode, they would also negotiate more realistic expectations by having parties reflect on additional or alternative interpretations. As Lean may have led to some tangible successes as well as to some sobering experiences, implementation managers have some leverage to negotiate alternative approaches and interpretations. By putting alternatives on par, implementation managers attempt to negotiate a more realistic approach for Lean's continuation. One informant explained how he managed to create a more sophisticated balance between quality and financial expectations among both medical professionals and the board of directors: *'We were able to manage [the financial results] more effectively and that was initiated by the board of directors, we saw that together, and it's a conclusion we drew with the doctors as well. Yes, that is what transpired after evaluating a couple of projects. But, there were also several projects where we put quality first. We had a lot of good financial results, and you saw that it was more effective than just working from the money. It is a difficult thing because we are a financially driven hospital. That will not change. But now we will present both the quality and the financial results, whereas first, we were held accountable for the financial part. That's what I mean, and it is a delicate balance if you don't pay attention, and we are not there yet.'* (Informant 24).

5.3. Synthesizing

When management and front-line professionals acquired some practical experience with Lean, applied how they saw fit, they developed and solidified distinct interpretations of the concept. Prior applications become embedded and guide their actions. A broader understanding of the concept evolves with an increasing understanding of what the concept could mean for the organization, allowing a tentative exploration of divergent interpretations and interests. Under these reliance conditions, we found that implementation managers establish interdependence among parties and embedding initiatives into collective action. To accomplish this, implementation managers (1) positioned the concept by connecting ownership over shared initiatives. They (2) stimulated a common and coherent discourse in which stories and labels are integrated. Also, implementation managers (3) channeled interpretations by provoking divergent understandings into shared expectations. We called this mode 'synthesizing' (see Fig. 4) as agents encouraged the interaction between management and front-line professionals concerning the implementation of Lean but now by deliberately merging existing interpretations and reconciling possibly conflicting views. This contrasts with a stretching mode, where parties are connected by matching superficial understanding, and the shielding mode, where conscious reflection is restricted to local levels.

Connecting ownership over shared initiatives (positioning) - As Lean has been embraced by different parties, invoking distinct interpretations and more realistic expectations, implementation managers find the momentum to connect the interpretation of Lean across hierarchical boundaries, and we find that Lean comes to be positioned in the 'line.'

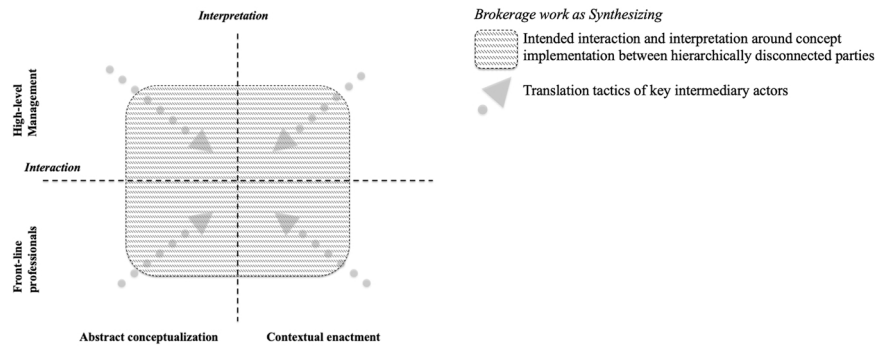


Fig. 4. Brokerage work as Synthesizing.

One of our informants indicated that she engaged in getting Lean embedded under one of their directorates to get parties across hierarchical boundaries in ‘the right mindset’ to ‘pull together initiatives’: *‘Just bottom-up doesn’t work; you also need a top-down movement. So, I think it is a good thing that we pull that together and join these forces and connect bottom-up and top-down with each other. But that is something I want, and you don’t achieve that just like that. So you have to get people in the right mindset to want that.’* (continues) *‘We don’t want to approach that as a program anymore because really it is something you need to do collectively. It should be embedded in the line, and that is why I favored this to be positioned under the directorate of ‘quality and patient safety.’* (Informant 22).

Whereas in a shielding mode, implementation managers protected vulnerable initiatives from too much outside scrutiny, in the synthesizing mode, informants indicated that they would ‘step out of the shadow.’ By going public, implementation managers opened up initiatives for collective interpretation. An informant explained how he experienced this mode as a very exciting adventure, one that was not without risk for the viability of the concept but necessary for its long-term survival: *‘Over time [with Lean], we did bigger, more care-related projects, giving meaning to the care process. Then, when we were under increased supervision, I did the [project]. It was a very big adventure [...] We had to come and talk about it; everybody wanted to know about it [...] But then we entered the category of ‘we are not doing a nice thing, but challenging things to help the hospital through hard times,’ and we were talked about all throughout the hospital. We put our big boy pants on and successfully squared the [project] during the period that we were under increased supervision. That brought our refugee status to formal adoption, meaning we are now positioned formally under the board of directors. And we now have our own terms of reference and formal recognition.’* (Informant 31).

Integrating stories and labels into common discourse (labeling) - In a synthesizing mode, we find that implementation managers aim to establish coherence in the language of Lean. Whereas labeling in the shielding mode entailed juggling conflicting stories with tainted labels, here we find persistent efforts to improve interaction across hierarchical boundaries by integrating stories and labels into common discourse. One informant aptly described how a ‘battle of methods’ was unproductive for a unified approach. In addressing this, she ‘gave their own language’ to a concept that would be recognized throughout the organization: *‘Here in [hospital X], you will find a lot of people who all think they can do a better job, and when they are told to do something they won’t do it. We are looking for ways to improve. That was the basis of introducing Lean in [hospital X]. These improvement methods are in a separate program, and we call them innovation or ‘Excellent [hospital X].’ We have left the battle of methods for what it is. We have given our own language to it, we talk about continuous improvement or working smarter, and everything falls under the umbrella of ‘Excellent [hospital X].’ We no longer talk about Lean, Kaizen, or Six Sigma; we try to veer away from that.’* (Informant 27).

In line with this, implementation managers stimulated commonality in the language by connecting the discourse of Lean to ‘the core values of the hospital’ and unifying different elements around the strategic

orientation of the organization. As another manager explains: *‘So we chose specifically what language we speak and what words we use. Every training is connected to our strategic direction, and we literally explain that if you are going on a holiday with your family, you should also agree on the destination. So the same goes for work. If we agree on something and you don’t stick to what’s been decided, there is a big chance that we don’t end up at our goal or destination. That is literally how we will explain things and the connection to our core values of the hospital. When we restarted [with Lean] we clearly specified that Lean should be in everything. So now we have it in our appraisal interviews, it will be in our vacancy ads and our introductory program.’* (Informant 17).

Provoking divergent understandings into shared expectations (channeling) - As our agents aim to connect interpretations across hierarchical boundaries, they explain how they purposely open up initiatives for reflection and collective interpretation. Instead of just keeping parties informed about the progress of others, we find implementation managers actively inviting interference. One informant reported: *‘I just mentioned financial cuts, well that was a tough discussion, a tough game. Are we going to act upon a vision to improve healthcare, or are we economizing here? And we talked to the board of directors about that. And at a certain moment, I went, together with one of our professors, to the board of directors, and we gave a presentation about what we thought we could bring with Lean. that was a really important moment.’* (Informant 8).

Informants noted that in this synthesizing mode, they aim to create shared expectations, going beyond initial compatibility, and rather construct alignment and similarity in what different parties are expecting from Lean. By unifying expectations of Lean toward the strategic orientation of the organization, implementation managers gain support for its durability. One informant indicated that she aims to connect Lean initiatives by encouraging her heads of surgery and her board of directors to start thinking of how to evaluate Lean initiatives by their contribution to the outcomes of the entire process of the ‘patient journey’: *‘The next phase is to improve at the chain level, so the next step is, with the heads of surgery and anesthesiology, we are making a plan to improve the chain process in the Lean way, where the chain really works together. Because one step can go well, but what if the next one doesn’t? And what I also see is, what is the organization evaluated on? Or the criteria? They are at the division or department levels. So you have very high scores here, but that implies that the next [department] in the chain has to do all kinds of extra work. The whole is not studied. There are no questions about the outcome of the chain process. I think that would be a major improvement if the Board of Directors were to ask about the [Lean] result of the chain.’* (Informant 12).

6. Discussion and conclusions

Our study sought to provide insight into how implementation managers as key intermediary actors variably deploy their organizationally central position in constructing the concept of Lean between hierarchically disconnected parties so as to better understand the practices

that shape intra-organizational translation. Based on our findings, we developed a conceptual model of brokerage work in the translation of management concepts (see Fig. 5).

Our model shows three brokerage modes of translation through which intermediary actors can shape the interaction between the organizational levels by which and the interpretative abstraction at which translation activities are performed. Each of these modes comprise the deployment of specific configurations of translation tactics (positioning, labeling and channeling), and are related to a number of key conditions. A stretching mode is typically associated with conditions of lenience – limited experience with a concept combined with superficial understandings of diverging interpretations among parties involved. In this mode, tactics are aimed at enhancing interaction across hierarchical boundaries and connecting different organizational levels, yet merely around an abstract conceptualization of what an idea entails. A shielding mode is strongly associated with conditions of dissonance – growing experience in applying the concept combined with a growing salience of differences in interpretations. In relation to these conditions, implementation managers tend to pursue a shielding mode, thereby, through their tactics, seeking to disconnect interaction across hierarchical boundaries, and allowing for diverging interpretations of abstract conceptualization’s translation into the different parties’ concrete local practices and vice versa. A synthesizing mode is associated with conditions that can be termed as reliance – elaborate practical experiences in applying the concept across different parties involved, combined with an enhanced understanding of what the concept could mean to different parties. In responding to these conditions, implementation managers seek to enhance interaction across hierarchical boundaries or connecting organizational levels by integrating their interpretations. Based on our model, we outline a number of theoretical implications below.

First, our study further develops our understanding of translation patterns by showing that concepts are not simply edited to ‘fit’ a local context, but that the use of translation tactics is strongly related to how key intermediary actors shape their social positions in this context. In

translation research, the notion of editing (Sahlin & Wedlin, 2008) is prominent, primarily because it draws attention to the link between local context and regularities in the translation of diffusing concepts (Morris & Lancaster, 2006; Teulier & Rouleau, 2013). Translation patterns are linked to how “different contexts provide different editing rules” (Sahlin & Wedlin, 2008, p. 226, see also Kirkpatrick et al., 2013). Our findings are consistent with the general idea of editing rules shaping translation patterns. We offer a more nuanced view of how these patterns may vary with different modes as intermediary actors draw on their social positions and brokerage roles to translate concepts between and across hierarchical layers. Based on our model, we argue that intermediary actors’ positions, associated with stretching, shielding, and synthesizing modes, play a role in specifying such ‘rules’ into tactics. For example, we showed how ‘labeling’ – coinciding with formulation rules – may shift from engaging simple stories with loose labels (stretching) to juggling conflicting stories with tainted labels (shielding) or integrating stories and labels into shared discourse (synthesizing). Further research should be encouraged to allow for a conceptualization of translation and the practices involved as a function of not just general embedding ‘editing rules’ but the social position of and its active leverage by key intermediary actors.

Second, our model suggests that by connecting or disconnecting interaction and interpretations between hierarchically disconnected parties intermediary actors may shape the direction of translation through three brokerage modes of translation. Through these modes, intermediary actors were found to affect the interaction between the organizational levels by which and the interpretative abstraction at which translation activities are performed, purposely drawing on each of those two to affect the other. This insight contrasts with the agency of intermediary actors in previous research, which has been conceptualized in relation to a primarily linear understanding of the translation process foregrounding local managers’ agency in terms of how “higher-level meanings are continually refined and modified as they are moved to lower levels” (Reay et al., 2013, p. 983; see also Zilber, 2006). Here,

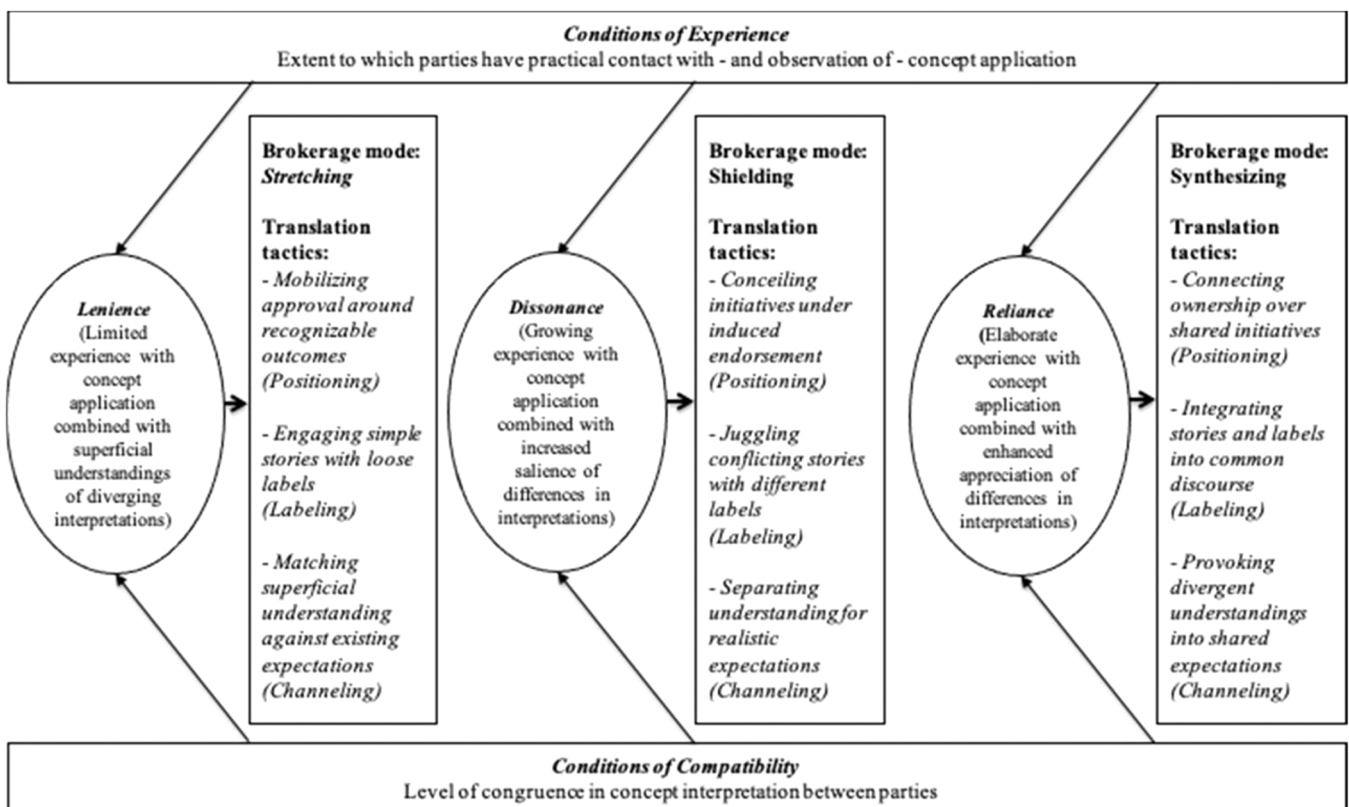


Fig. 5. A conceptual model of brokerage work in the translation of management concepts.

higher level managerial activities appear to concern the development of abstract categories in the appropriation of rhetoric whereas professionals' frontline activities appear to concern the enactment of the concept into daily practice and discourse. Our model reflects how implementation managers impact translation by having *both* management and frontline professionals rhetorically appropriate abstract concepts *and* contextualize them in practices and discourses in relation to the conditions associated with the three brokerage modes of translation.

This conceptualization of brokerage modes of translation relates to others' work specifying the translation process into modes. For example, Røvik (2016) developed a typology of three translation modes (the reproducing, the modifying, and the radical mode), "likely to lead to low, medium and high transformation of the transferred knowledge, respectively" (p. 7). Or Linneberg et al. (2019) who distinguish between high- and operational-modes of translation attributed to upper management and lower-level managers and front-line employees respectively. However, we argue that our repertoire offers a more nuanced view of how different translation modes vary with the social positions and brokerage role of intermediary actors, providing an understanding of 'modes' that goes beyond an attributed 'strength of translation' in connection to specific 'levels' of organizational actors performing them. We hope our study not only contributes to an increased understanding of the micro-practices that shape intra-organizational translation but to an emerging research agenda going beyond implicitly linear conceptions of translation (Wedlin and Sahlin, 2017; Nielsen et al., 2021) by providing empirical and conceptual insights into how directionality in translation involves a complex interplay between the organizational levels by which and the interpretative abstraction at which translation activities are performed.

Third, our study shows how actors pursuing misalignment - through 'shielding' between high-level management and front-line professionals - needs to be considered as a significant and under-theorized part of the translation process. Whereas prior literature on translation has conceptualized alignment between organizational-level ideas and micro-level practices as critical (e.g., Ansari et al., 2014) our study reveals how boundaries between parties within organizations may be productive and actively used for translating management concepts. For example, in the shielding mode, the interaction across hierarchical boundaries is disconnected to allow for different interpretations from abstract conceptualization into concrete practices and vice versa. By contrast, in the stretching mode, agents restrict the link between abstract conceptualization and concrete practices to connect the interaction across hierarchical boundaries around abstract ideas. Paying attention to brokerage roles enabled us to clarify how translation tactics can shift with the social positions of key agents as idea carriers crossing organizational boundaries. This attention to misalignment as a deliberate tactic from intermediary actors allowed a better understanding of why during the translation process people at different organizational levels may appear to 'live in different worlds' (Corbett-Etchevers & Mounoud, 2011; McCann et al., 2015).

We now consider this study's limitations, each giving rise to other potential research areas. The first issue relates to the level of professionalization in the empirical context we studied. Although we expect our findings to be relevant to understanding translating concepts and ideas in other empirical settings, hospitals are complex, highly professionalized organizations. It is, therefore, difficult for hospital management to impose change based on hierarchical position, resource control, or expert knowledge (e.g., Currie et al., 2012). As our research showed how the translation of concepts relates to the efforts of key agents to construct ideas between parties, it may be complemented by research in less professionalized settings, studying whether intermediary actors have similar capacities to actively employ their social position and engage in similar tactics.

The second limitation concerns our reliance on one-off, face-to-face, retrospective interviews with key individuals. Given our interest in the role of intermediary actors and their translation practices, we pursued

an interview approach implementation managers in the Dutch LIDZ network. Nonetheless, we know that ideas and concepts do not transform under the authorship of isolated actors (Røvik, 2016). These concerns might be addressed by follow-up research that examines change participants in different roles and across hierarchical boundaries. Process research (e.g., Langley et al., 2013) with real-time observations and interviews at different points in time could help develop this exploration.

Based on our findings, we offer some practical recommendations for individuals in change intermediary roles. For example, the translation tactics we identified can be linked to improving middle managers' translational work during organizational change, especially since we provide indication under which conditions specific usage may be beneficial towards specified ends. Here, our study shows how 'shielding' between high-level management and front-line professionals can be actively employed in the translation of management concepts, which may initially go against social norms of rationality and efficiency central to the managerial identity (Abrahamson, 1996).

In conclusion, we have sought to contribute to a more sophisticated understanding of the practices that shape intra-organizational translation by showing how translation patterns may vary with the brokerage work of intermediary actors as they construct ideas between high-level management and front-line professionals.

CRediT authorship contribution statement

Marlieke van Grinsven: Conceptualization, Methodology, Validation, Formal analysis, Investigation, Resources, Data curation, Writing – original draft. **Stefan Heusinkveld:** Conceptualization, Methodology, Validation, Investigation, Writing – original draft.

Data availability

The data that has been used is confidential.

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Appendix A. Supporting information

Supplementary data associated with this article can be found in the online version at doi:10.1016/j.scaman.2023.101281.

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