A patient is not a car

van Grinsven, M.

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CHAPTER 3

ALIGNING THE MEANING OF LEAN: BOUNDARY SPANNING IN THE TRANSLATION OF MANAGEMENT CONCEPTS

By maintaining a focus on managers in driving the implementation of management concepts, with meaning-making 'trickling down' the organization, translation perspectives have provided little detail about translation across intra-organizational boundaries. This study focuses on the boundary-spanning practices of intermediate agents championing the implementation of Lean in a hospital setting. Based on various sources of qualitative data, including interviews with forty boundary spanners, we develop a theoretical model of boundary spanning in translation. We identify a set of micro-practices intermediate agents draw upon in aligning the meaning of Lean across professional and managerial boundaries. We show how, in relation to modes of bridging, buffering and blending, micro-practices vary as a function of contextual conditions and strategic orientations. Our study shows how buffering is a significant, yet under-theorized part of translation. It offers a more nuanced view of boundary-spanning agents in translation, and clarifies the use of 'editing rules' shaping translation practices.

Keywords: *agency, boundary spanning, management concepts, translation*

3.1 INTRODUCTION

During the last two decades we have seen a growing academic interest in the flow of management concepts and their impact on people, organizations and society (Birkinshaw, Healey, Suddaby and Weber, 2014; Mueller and Carter, 2005; Knights and McCabe, 1998; Nicolai et al., 2010; Reay et al., 2013). A growing body of research that addresses this topic draws from translation theory. Translation scholars focus on explaining how and why concepts are adapted into new local settings and change along the way. On an organizational level, the translation perspective provides an advanced understanding of how concepts are 're-invented' to 'fit' specific organizational contexts (Ansari, Fiss and Zajac, 2010; Benders and Van Veen, 2001; Czarniawska and Sevón, 1996). While acknowledging the role of managerial actors (Ansari, 2014; Reay et al., 2013; Zbaracki, 1998), translation researchers have shown how significant disparity may arise between organizational adoption and front-line practice, as other relevant actors at different levels in the organization may respond with linguistic ambiguity (Kelemen, 2000) or use the concept in strategic ways (Nicolai and Dautwiz, 2010; Zbaracki, 1998). As such, translation theorists stress the need for considering that 'the spread in time and space of new ideas is in the hands of people' (Radaelli and Sitton-Kent, 2016, p. 14; see also Johnson and Hagström, 2005). With its focus on how concepts and ideas are made locally meaningful to specific organizations, the translation perspective moved the 'consumers' of such concepts to the forefront of inquiry (Corbett-Etchevers and Mounoud, 2011; Heusinkveld, Sturdy and Werr, 2011).

However, prior literature has maintained a focus in which ideas are given new meanings as they 'trickle down' from higher to lower levels, emphasizing the role of executive managers, as archetypal consumers of management knowledge in defining the shape and organizational interpretation of management concepts. These top-down approaches have limited our understanding of micro-processes of meaning construction and negotiation (Gray, Purdy and Ansari, 2015), because they do not allow us to fully grasp the complex dynamics of intra-organizational meaning-making as a cyclical and iterative process. This is an important gap because a more sophisticated understanding of the meaning-making between organizational levels is likely to shed important light on the practices that shape intra-organizational translation and is likely to further our understanding of the reasons why particular meanings may prevail in organizational practice (Teulier and Rouleau, 2013).

In seeking to address these limitations, we adopt a boundary spanning perspective as it emphasizes the importance of intermediate actors who engage specific sets of practices to create dynamic links across professional and managerial boundaries, where goals and expectations are at least partially conflicting. Based on our analysis of qualitative data, including forty interviews with boundary spanners, we develop a theoretical model of boundary spanning in translation that identifies three general categories of practices (positioning, labeling and channeling) through which boundary-spanning agents aim to enhance alignment in the meaning of management concepts across organizational boundaries. We show how specific micro-practices may vary as a function of contextual conditions and strategic orientations related to bridging, buffering and blending modes. This model contributes to extant literature in three ways. First, by providing a set of practices intermediate agents may draw upon in aligning the meaning of 'Lean' (the concept focused upon empirically) between higher-level management and work-floor professionals, our study offers a more nuanced view of the role of boundary-spanning agents. It thereby stresses the need to go beyond the emblematic perspective by which higher-level meanings are translated to lower levels and to spend more attention to the pliable and distributed character of translation processes in future studies. Second, rather than only considering practices aimed at connecting or aligning different meanings (Latour, 1986), our study illuminates how buffering is a significant, yet paradoxical and under-theorized part of translation. Third, by showing how boundary-spanning activities can be seen as a function of specific orientations agents take in their mediation in the professional and managerial hierarchy, our study further clarifies the context-specific use of 'editing rules' shaping translation practices.

The paper is structured as follows. We first provide a concise review of the extant literature on the translation of management concepts and the under-theorized role of agency. We then introduce the notion of boundary spanning as an analytical lens, followed by the discussion of our research methods and empirical context. Next, we present our findings thereby showing how boundary spanners may draw upon an orchestrated set of practices to ultimately align meaning-making across organizational levels. Finally, we discuss theoretical implications and provide directions for further research.

3.2 TRANSLATING MANAGEMENT CONCEPTS

Taking issue with neo-institutional models of diffusion, translation scholars shifted their focus of how management concepts are enacted towards the situated nature of institutionalization (Kraatz and Block, 2008) and emphasized the significance of studying practice variation over standardization and isomorphism (Czarniawska and Joerges, 1996; Czarniawska and Sevón, 2005; Lounsbury, 2008; Røvik, 1996; Sahlin-Andersson, 1996; Sahlin and Wedlin, 2008; Spyridonidis, Currie, Heusinkveld, Strauss and Sturdy, 2016). Originally inspired by Actor-Network Theory (Callon, 1986; Law, 1986, 1991; Latour, 1986, 1987), these theorists have provided important insight into the 'second career' and reinterpretation of management concepts after the discrete event of their 'adoption' (Nicolai and Dautwitz, 2010). Translation scholars 'focus on the modification of ideas by agentic actors in relation to a specific context' (Van Grinsven, Heusinkveld and Cornelissen, 2016, p. 2). By emphasizing that variation and change are inseparable from the way in which concepts, ideas and practices are transmitted between contexts (Fiss et al., 2012, p 1096), they have redirected our attention to the active engagement of change participants and their complex interactions to make different meanings mutually compatible (Balogun et al., 2005; Boxenbaum and Strandgaard Pedersen, 2009; Corbett-Etchevers and Mounoud, 2011; Denis, Langley and Rouleau, 2003; Frenkel, 2005; Gond and Boxenbaum, 2013; Gondo and Amis, 2013; Spyridonidis et al., 2016; Latour, 1986). However, despite the fact that this focus has significantly advanced our understanding of why and how ideas and concepts are adopted (Boxenbaum and Battilana, 2005; Boxenbaum and Strandgaard Pedersen, 2009; Reay et al. 2013), translation research in management exhibits at least three notable shortcomings.

First, central to this growing strand of research and its understanding of the circulation of ideas, objects and practices, is the 'travel of ideas'-metaphor where the adaptation to new local settings results in meaningful changes (Czarniawska and Joerges, 1996; Mica, 2013). Yet, this metaphor reflects a unidirectional, top-down logic in which meaning-making 'trickles down' from higher to lower levels. Such a conceptualization does not allow us to fully grasp what happens when ideas and concepts are given new meaning in different localities, with meaning-making as cyclical and iterative processes (Czarniawska and Joerges, 1996), and is at odds with literatures on strategic change that point at the possibility and even likelihood of simultaneous top-down and bottom-up processes of implementation (Sonenshein, 2010). We find this metaphor, 'where higher-level meanings are continually refined and modified as they are moved to lower levels' (Reay et al., 2013, p. 983; Zilber, 2006) applied to varying levels of analysis

(Teulier and Rouleau, 2013); to illuminate the travel from broad socio-cultural frameworks to specific, industry-related rational myths (Frenkel, 2005, Zilber, 2006), from policy levels into sets of specific practices (Morris and Lancaster, 2005), from corporate, multinational levels to local adaptation at subsidiaries (Ansari, Reinecke and Spaan, 2014) and from the organizational to the individual level. Reay et al. (2013), for example, investigate managerial efforts to translate a concept that was accepted at the organizational level, to fit the specific, local circumstances at the 'front line'. And Corbett-Etchevers and Mounoud (2011) show how ideas are consumed by general management and subsequently imposed on employees through policy, which results in a plurality of meanings.

Second, and related, even though a number of scholars in this tradition have concentrated on deconstructing and analyzing the processes of translation (Zilber, 2006), generalized accounts of the steps or acts involved reveal a persistent emphasis on convergence and alignment. Such an emphasis may reflect a limited understanding of complex meaning-making processes, especially given the fact that the persistence of alternative foci, interests and related interpretations among different parties (Kelemen, 2000; Nicolai and Dautwiz, 2010; Zbaracki, 1998) make alignment seem impossible or even undesirable. With the exception of Teulier and Rouleau (2013) who—albeit implicitly—draw attention to the actual *generation* of space ('discursive space' by Hardy and Maguire, 2010) and Reay et al. (2013), who argue that managers encourage professionals to engage in 'quasi-independent meaning-making', translation studies primarily focus on *connecting* interpretations as a means to overcome distance and to align meaning-making. These efforts towards alignment in creating this compatibility are strongly reflected in the perspective's conceptualization of translation as '[making] new practices to fit the adopter's particular situation' (Ansari et al., 2010, p. 85). Explicitly or implicitly drawing on Actor-Network Theory, theorists argue 'the trick for a would-be 'translator' is to make the different meanings mutually compatible' (Denis, Langley and Rouleau, 2003, p. 184). Sahlin-Andersson (1996) suggested that 'the distance between the source of the model and the imitating organization forms a space for translating, filling in and interpreting the model in various ways'. Zilber (2006) distinguishes between three acts of translation, which relate to changes as broad accounts are reshaped to more precisely *fit* a local context; changes over time and changes across institutional spheres. Gond and Boxenbaum (2013) discuss how actors employ three types of contextualization work—filtering, repurposing, and coupling—'to *overcome* the lack of fit between the imported practice and their local context' (p. 708, emphasis added).

Third, the contextual conditions that may shape what specific actors do, and the practices they may strategically draw upon to establish practice change, remain relatively opaque (Huising, 2016; Zilber, 2006). As translation studies still tend to emphasize the actual changes of ideas, or the dynamics by which transformations are achieved (Teulier and Rouleau, 2013; Reay et al., 2013), 'the people involved in changing the practices their experiences, interpretations and decisions are not at the center of the literature…' (Huising, 2016, p. 388). And the studies that do study individual agency, have focused mainly on higher-level, executive managers (Balogun et al., 2005; see also Ansari et al., 2014). As such, other actors 'who may have significant influence on the translation process, have not been subject to any systematic analysis of their role' (Radaelli and Sitton-Kent, 2016, p. 2; see also Rouleau, 2005; Teulier and Rouleau. 2013). To address this, behavior and activity in explicating the process of institutionalization have become more central (Reay et al., 2013) and especially middle managers' translational work has started to receive increasing attention (Balogun and Johnson, 2004; Currie and Procter, 2005; Mantere, 2008; Spyridonidis and Currie, 2016; Teulier and Rouleau, 2013; Wooldridge, Schmid and Floyd, 2008). However, literature on what specific intermediate agents actually do in practice 'to implement change initiatives across internal organizational boundaries' (Balogun et al., 2005, p. 261; Teulier and Rouleau, 2013; Spyridonidis and Currie, 2016) is still scarce and 'no study has investigated translation as a role that [these agents] perform . . . as part of their core responsibility' (Radaelli and Sitton-Kent, 2016, p. 17).

In seeking to address these limitations, we adopt a boundary spanning perspective, because it emphasizes the agency of intermediate actors in creating dynamic links across organizational boundaries and engaging different sets of practices as a result of contextual conditions and strategic orientations. This also allows us to study how these positional roles come to be shaped by these actors' experiences, interpretations and decisions in translating management concepts to make them locally meaningful.

3.3 BOUNDARY SPANNING: DYNAMIC LINKS AND PRACTICES

Boundary spanning is defined as 'positions that link two or more systems whose goals and expectations are at least partially conflicting' (Steadman 1992, p. 1). Boundary spanners, as strategically positioned individuals, are expected to facilitate the flow of knowledge across geographical, organizational and departmental levels, simultaneously spanning physical, cultural and political boundaries (Sturdy et al., 2009; see also Allen and Cohen, 1969; Allen, Tushman and Lee, 1979; Cohen and Levinthal, 1990; Cross and Parker, 2004; Davenport and Prusak, 1998; Hargadon and Sutton, 1997; Tushman and Scanlan, 1981). Whereas boundary-spanning activities have primarily been conceived of as relating organizations to their environmental context, such as in relation to strategic alliances (Balogun et al., 2005; Scott, 1998), more recent studies have looked into the role of individuals spanning intra-organizational boundaries (Balogun et al., 2005), linking internal rather than external activities (Ancona and Caldwell, 1992; Katz and Kahn, 1978; Kostova and Roth, 2003; Tushman and Scanlan, 1981; Zaheer, McEvily and Perrone, 1998). Currently, we find a burgeoning literature examining the important strategic role of middle managers, hybrid middle managers (HMM's) and brokerage professionals mediating the professional and managerial hierarchies in implementing strategic change (for example, Balogun, 2003; 2005; Currie and Procter, 2005; Dutton, Ashford, O'Neill and Lawrence, 2001; Kellogg, 2014; Mantere, 2008; Rouleau, 2005). These studies show how specific intermediate individuals dynamically 'build networks upwards, laterally and downwards, thereby enabling them to alter their context of operation (the power of the system) in ways which extend their discretion' (Balogun et al., 2005, p. 268).

The (micro-)practices these strategically positioned individuals engage in have been subject to academic scrutiny (Rouleau and Balogun, 2011; Spyridonidis et al, 2016) and the literature suggests that boundary spanners (brokers) generally can draw upon two categories of practices to coordinate across stakeholders: connecting practices and buffering practices (Balogun et al., 2005; Kaplan, 2016; Kellogg, 2014; Scott, 1998). In building on the conceptions of 'tertius iungens' and 'tertius gaudens' from social network theory, these categories of practices reflect different orientations. Tertius iungens denotes 'a third who unites' (Baker and Obstfeld, 1999; Burt, 2004; Obstfeld, 2005; Simmel, 1950; Tortoriello, 2010) and reflects a strategy through which a third party takes the role of 'bring[ing] certain people together' (Lingo and O'Mahony, 2010, p. 58). By building trust, fostering legitimacy and by creating an environment that elicits contributions (Lingo and O'Mahony, 2010), boundary spanners may introduce or facilitate preexisting ties or interaction (Burt 2012; Fernandez-Mateo, 2007; Fleming and Waguespack, 2007; Kellogg, 2014; Lingo and O'Mahony, 2010; Powell, Packalen, and Whittington 2012). Collins-Dogrul argues that iungens brokerage is more than a bridge between dyadic ties but rather ‘a catalyst that enables and enhances cooperation’ (2012, p. 92). The term tertius gaudens, in contrast denotes ‘a third who gains’ (Baker and Obstfeld, 1999; Burt, 2004; Kaplan, 2016; Obstfeld, 2005; Simmel, 1950; Tortoriello, 2010) and reflects an approach through which a third party alters the social dynamics of dyadic ties by actively separating the two for their own gain. By ‘keep[ing] certain people apart’ (Lingo and O’Mahony, 2010, p. 58) and controlling when and how parties engage with a process, individuals may benefit from their unique ties (Burt, 2000; Ibarra, Kilduff and Tsai, 2005).

While boundary spanners in the same position may draw on these different sets of practices (Burt 2012; Fernandez-Mateo, 2007; Lingo and O’Mahony, 2010; Powell, Packalen, and Whittington 2012), the boundary spanning literature has come to conceptualize these categories of practices as reflecting ‘strategic orientations’ and has recently started exploring and demonstrating conditions under which these categories are ‘the preferred means for approaching problems’ (Obstfeld, 2005, p. 104). Beck and Plowman (2009), for example, reveal how, during early stages of interpretation, middle managers encourage divergence in interpretations across hierarchical levels, where during later stages they will synthesize interpretations into convergence. In line with this, Lingo and O’Mahony (2010) show how brokers on creative projects vary their brokerage approach depending on the nature of the ambiguity encountered—drawing on a tertius gaudens approach to respond to ambiguity over occupational jurisdictions and on a tertius iungens approach to respond to ambiguity over quality. Kellogg (2014) investigates the role of specific boundary spanning individuals in the interstices between existing professional jurisdictions. She argues that when collaboration tasks represent professionally ill-defined problems, boundary spanners are more effective in facilitating cross-group collaboration if they use buffering practices like maintaining tasks, managing information, and matching meanings. However, when these tasks mainly comprise high status, high value challenges, enabling the involved professional jurisdictions to employ their expertise and identities, connecting practices like transferring information, translating meanings, and transforming interests are critical to accomplishing reform.

This view of ‘a strategic third’ (tertius) is particularly relevant when new concepts and practices are introduced into organizations. Whereas the concepts ‘tertius gaudens’ and ’tertius iungens’ tend to reflect functional network studies focusing on processes and structures, using them as sensitizing heuristics allows us to take a closer look at intermediate actors who engage specific sets of practices to create dynamic links within organizations and who may differentiate between divergence and convergence—with buffering or connecting practices—as a function of contextual conditions and strategic orientations. Therefore, this study aims to answer the question: How do key intermediate actors translate management concepts across professional and managerial boundaries?

3.4 METHOD

Research setting

Investigating how boundary spanners contribute to translating management concepts is best done by studying management concepts that are associated with significant changes in behavior and orientation, in a context where its application is novel, as this allows for intermediate actors to exercise agency. As such, we chose to study the implementation of 'Lean' in Dutch healthcare, where its application in hospitals is relatively new (Brandao de Souza, 2009; see also Benders, Van Grinsven and Heusinkveld, 2014). This context offers a good place to study specific key actors operating between stakeholders across professional and managerial boundaries, since imposing change based on hierarchical position, resource control or expert knowledge is unlikely to be successful (Radaelli and Sitton-Kent, 2016), because of the privileged position of medical professionals (e.g., Currie, Lockett, Finn, Martin and Waring, 2012; Ferlie, Fitzgerald, Wood, and Hawkins, 2005; Kellogg, 2009). We expected significant efforts of boundary spanning individuals to translate the concept in these interstices of the professional and managerial hierarchy (Kellogg, 2014).

Lean can be traced back to scientific management traditions, but in particular, to the Toyota production system (TPS) in 1950s Japan (Holweg, 2007; Ohno, 1988). Despite different interpretations and definitions, Lean is generally associated with process improvement and waste reduction (Womack, Jones and Roos, 1990; 2007; see also Birkinshaw, Hamel and Mol, 2008; Morris and Lancaster, 2006). Lean principles imply the constant maximization of customer value and the elimination of wasteful (non-value adding) activities ('muda') through continuous quality improvement ('kaizen') and radical improvement activities ('kaikaku') (Womack, Jones and Roos, 1990; see also Morris and Lancaster, 2006). Additionally, there are well-known Lean methods and techniques, including just-in-time (JIT), one-piece flow, 5s-workplace standardization, KANBAN (pull system) and value stream mapping (Benders, Van Grinsven and

Heusinkveld, 2014). Lean ideas and techniques have become widely applied in a multitude of contexts including construction, (local) governments and higher education. In Dutch healthcare, the implementation of Lean principles in a number of pioneering hospitals constituted the basis for the formation of a national network of healthcare institutions in 2011, 'LIDZ' ('Lean in de zorg' - Lean in healthcare). LIDZ initiates a variety of activities to promote the core principles of Lean. Its growing number of members, both individual and organizational, suggests an increasing appeal of the idea and at the time of study 57 healthcare organizations had joined the network including 38 Dutch hospitals. The hospitals that joined the LIDZ network are an ideal context for our purpose.

Data collection

We decided to pursue an interview approach with key individuals in the network to go deeper into the role of key agents in translating Lean in their hospitals and to identify patterns in their translation of Lean across organizational boundaries. The primary data comprise interviews and observations of 'Gemba walks'. Contextual data were gathered to gain a better understanding of the implementation of Lean in a hospital context (see Table 1.1 and Appendices 1 and 2 for an overview and detailed description of the data).

All 38 contact persons of the Dutch hospitals in network were sent a request to be interviewed and in total, 45 retrospective interviews were conducted between July 2014 and January 2016. Most interviewees had been with the organization from the initial introduction of Lean and, given their close and long-term involvement, can be expected to provide a rich and chronological account of its development. All individuals have a formal role in managing the implementation of Lean and were in direct contact both with higher-level managers and with work-floor employees, hence fulfilling the definition of a nominated boundary spanner as an individual managing the implementation of a concept, spanning different intra-organizational boundaries. The Lean principles were central to their practices and to their membership in the LIDZ network, and these agents shared similar tasks and responsibilities with respect to the implementation of Lean in the hospital. Whilst sharing similar sources with regard to the concept, their respective hospitals used various terms and associated philosophies, including: Productive Ward, Planetree, Operational Excellence and Six Sigma. The interviewees held different staff positions, hold various backgrounds and were of different ages. Also, the hospitals differed in type, as the network spanned general and specialist hospitals, and university medical centers and top clinical centers (see Appendix 1 for a detailed overview of the interview data). Additionally, hospitals are in differing stages of development when it comes to the implementation of Lean. In joining the network all members were asked to self-indicate their 'Lean phase' on a scale from one to four, which reflected the development of Lean implementation ranging from 'early stage' to 'advanced' in the organization as a whole. Hence, we were provided with self-assigned indications of the development of Lean for all the hospitals in the network. These self-assigned indications, did not necessarily reflect an objective stage of development, but did reveal considerable variation in stages of development and facilitated the identification of patterns in the translation efforts of key individuals. As the chairman of the network remarked: *'It's up for discussion whether they should be a three or four, but I don't think many have assigned themselves a four, when they really are a three. The margin of error is one. And Toyota, in every list tops the ranks, a four is highest in relation to the hospitals in the network.'* Overall, we expect that this variety in the settings can enhance the chances to discover relevant constructs and their properties.

All interviews followed the same semi-structured approach. The main idea was to start with interviewees' personal backgrounds and experiences with Lean, then to discuss its intra-organizational development and finally to have them describe their interaction with other organizations with respect to implementing Lean. Yet, whereas the interview structure remained the same during the data collection, the role of inter-organizational dynamics in translation processes seemed less significant to these individuals than their specific position among the different stakeholders within their organization. Accordingly, we developed a stronger sensitivity to the interviewees' accounts of intra-organizational activities in relation to the translation of Lean. Interviewees were allowed to interpret the questions freely and we encouraged them to pursue the themes they regarded as central. After piloting and exploratory research, most interviews were held at the informants' offices and lasted 75 minutes on average. To invite comments on our nascent findings, we also interviewed the chairman of the network, the network coordinator and the representative of the health insurance company, all of whom had played an active role in the development of the network. Also, we conducted two interviews with external consultants who had consulted a number of hospitals in introducing Lean. All interviews were tape recorded with approval of the interviewees and transcribed verbatim. The interview language was Dutch and the authors translated the quotes in the findings section. Informants were assured confidentiality, and quotes that compromised anonymity were altered or omitted.

In addition, the first author observed ten so called ‘Gemba walks’; site visits organized by network members as a means to exchange knowledge. Gemba walks lasted three hours on average and were tape recorded with approval, and were, for most part, transcribed verbatim and coded similar to the interview data (see Appendix 2 for a detailed overview of the ‘Gemba walks’ data). As background information and in adding conceptual depth to the translation of Lean from its 'context of origin' (car manufacturing) to the 'recipient' hospital context also contextual data were gathered. This included documents such as annual reports, power point presentations, books published by members of the network and websites. A company visit to a Scania factory by the first author allowed for a closer understanding of Lean in the ‘context of origin’.

Data analysis

Our data analysis started with the question: How do key intermediate actors translate management concepts across organizational boundaries? The analysis progressed in three overlapping stages. In an initial analysis, we open coded for the accounts boundary spanners gave of their practices to involve others in adapting Lean. This involved extracting all sections that related to ‘getting others on board’ (Balogun, Gleadle, Hailey and Willmott, 2005). These sections were then read carefully and annotated ‘in vivo’ and our coded data revealed varying forms of ‘micro-practices’, i.e., decontextualized activities by individual agents (Radaelli and Sitton-Kent, 2016). By looking for regularities and patterns in the data we identified three main categories of practices, which we dubbed ‘positioning’, ‘labeling’ and ‘channeling’. In a third stage of selective coding, we reviewed and validated our data coding, and further conceptualized the observed differences in the way these general practices are interpreted. After constant comparison of the emerging constructs we found that these practices could be fruitfully considered as a function of the underlying strategic orientations of the boundary spanners involved. In ‘a constant movement back and forth between theory and empirical data’ (Wodak, 2004, p. 200) we began to organize variation in three separate modes, which we define as; a manner of acting that can be favored and actively employed by agents as a function of their relative position (Gibbons, 1994; Morris and Lancaster, 2006; Sahlin and Wedlin, 2008). These modes are dubbed ‘bridging, ‘buffering’ and ‘blending’. Our final categories are presented in

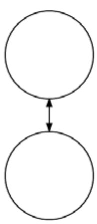
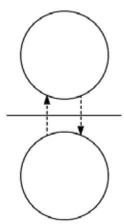
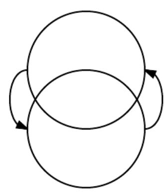
Table 3.1 and are further outlined in the following sections. Table 3.2 provides additional examples of the data.

3.5 FINDINGS – BOUNDARY SPANNING IN TRANSLATION

As we analyzed our data, we began to see that the concerted efforts of boundary spanning individuals cannot be seen as primarily unidirectional but reflected an multidirectional set of general practices to align top-down and bottom-up initiatives: 'positioning', 'labeling' and 'channeling'. Furthermore, we found that boundary spanners applied specific forms of these general practices either to connect or disconnect the meaning-making across organizational boundaries and our data showed that the way in which they do exhibited significant shifts. Thereby we distinguish modes of 'bridging, 'buffering' and 'blending'. One informant aptly summarized these shifts in modes: '*(1) As a group of three, we were put there by the board of directors. But never were we formally appointed. Never did we get a formal position. So what we were was some kind of directing committee, that was attended less and less. (2) Then, we were tolerated to stay and in hindsight we were positioned quite well. We were three asylum seekers with a refugee status on the hospital pay roll. And we were allowed to do a little Lean, provided we were in nobody's way, made some people happy and no one put the brakes on it. . . . 'It is nice what they do and it doesn't bother us.' (3) But then we entered the category of 'we are not doing nice things, but challenging things to help the hospital through hard times' and we were talked about all throughout the hospital. We put on 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 and means that we are now positioned formally under the board of directors. And that we now have our own terms of reference and formal recognition'* (Informant 30).

To do justice to these three modes, we have chosen to present our findings accordingly. However, even though these modes, and our sequential description of them, may seem to reflect a linear process, we wish to stress that we view these modes as a manner of acting in which conditions and practices interact. Hence, the three modes should not be seen as a pattern, but rather as positions, that may also remain fixed, or where shifts may reflect iterations or 'backward steps'. In fact, on a number of occasions, interviewees noted that altered conditions urged them to change modes. One of these conditions concerned a change of management, as one or multiple members of the board of directors were replaced: *'And our board of directors was like 'you have trained enough people'. We now have a new [member of the board of directors], which makes that the support we have for Lean is shifting, because he will see it as a toolbox . . .'* (Informant 16). Whereas, in contrast, other would be confronted with newly hired medical professionals that were familiar with the concept: *'We have new theme principals that come from outside and that worked with [Lean] in their previous organizations. There have been a lot of factors of influence; theme principals that did not relate to the concept have left and were replaced with people who say 'you know process optimization, Lean, we all know that, why don't we do that here?''* (Informant 24).

Table 3.1 ***Modes of boundary spanning in translation***

		MODES	
	(1) Bridging	**(2) Buffering**	**(3) Blending**
Conditions	Management and work-floor professionals have limited experience in working with the concept. Some initial enthusiasm but no conscious understanding or willingness to embrace. Interpretations and interests are likely to be diverse.	Management and work-floor professionals are starting to understand the concept's workings in practice. Conscious reflection on what the concept entails. Conflicting explanations and implications arise.	Meaning-making and action of management and work-floor professionals remain at local levels. Collective meaning-making and action are necessary to address experienced shortcomings and to make initiatives last.
Definition	The meaning-making across organizational boundaries is **connected without too much reflection** on what the concept may entail and what is needed in terms of active involvement on their part.	The meaning-making across organizational boundaries is **disconnected** and quasi-independent by **restricting conscious reflection** to local levels.	The meaning-making across organizational boundaries is **connected** by merging existing interpretations and reconciling conflicting views through **conscious reflection**.
Micro-practices of boundary spanning in translation	*Positioning* • Securing endorsement (pilot) • Communicating success *Labeling* • Loose labeling • Simple speak *Channeling* • Matching superficial understanding • Meeting existing expectations	*Positioning* • Inducing ownership (program or project) • Concealing initiatives *Labeling* • Replacing dys-functional labels (-) • Juggling conflicting story lines *Channeling* • Informing to enable separate understanding • Negotiating realistic expectations	*Positioning* • Connecting ownership (line) • Going public *Labeling* • Replacing labels (+) • Stimulating common discourse *Channeling* • Provoking reflection for shared understanding • Creating shared expectations
Figure capturing boundary spanning in translation			

(1) Bridging

When the concept of Lean is formally or informally introduced in the organization, both higher-level management and work-floor professionals generally have only limited experience in working with it. They do not yet consciously understand its consequences, nor are they willing to embrace the concept just yet. However, some initial enthusiasm is apparent. In terms of its application and sense of urgency, interpretations and interests are likely to be diverse between different parties. To address this, implementation managers engaged significant efforts to make sure that stakeholders broadly commend and support it. Such broad support would signal the initial enthusiasm and cohesion necessary to engage in experimentation with Lean. To accomplish this, implementation managers *positioned* the concept through securing endorsement and by communicating small successes. They engaged in loose *labeling* and introducing simple speak to allow for multiple, yet different interpretations, without making this too obvious. Also, they *channeled interpretations* by matching superficial understanding and meeting extant expectations. In doing so, implementation managers superficially connect the meaning-making of higher-level management and work-floor professionals without too much reflection on what the concept may entail and what is needed from these stakeholders in terms of their active involvement. The micro-practices associated with this 'bridging' mode are further described and illustrated below.

Positioning

Securing endorsement - Implementation managers told us how they—in response to stakeholders having limited experience with the concept—initially positioned it by securing endorsement. They employed practices aimed at cajoling approval to introduce the concept. Energy is directed at getting stakeholders to say yes, not primarily at making them understand how the practice works. Lean is positioned in the organization as a pilot, under which the implementation managers may have some room for experimentation, but have limited formal authority. One informant explained:

> *'We have sort of made it obligatory in the end, coming from the staff board. Because we had them on board in that we were going to work with Lean in the hospital and they had agreed to that. We had expressed some conditions of which we thought they needed to be*

met . . . and one of them was training. And since they had said yes, this implied they also agreed to training. So the staff board said we expect someone to be there from every partnership ('maatschap'). So I think it was more or less obligatory, not sure if that was said out loud, but they were all there.' (Informant 19)

Communicating success - For this initial mode of bridging, our interviewees expressed how they engaged in the practice of actively communicating success as a way to limit disagreement across organizational boundaries. They selected successful examples of in-house applications to advertise them to establish certain levels of enthusiasm:

'My boss . . . had faith in it and he was very influential. We also had departments that were very enthusiastic and it was not just us saying that. So I took him to the floor, this is what it is and he saw people who were improving every day, painting a picture of what it could be.' (Informant 10)

Labeling

Loose labeling - Our informants suggested that to superficially connect the meaning-making of higher-level management and work-floor professionals, loose labeling allowed for interpretations in which different parties would recognize themselves. Specifically, a broad interpretation of what the concept of Lean might entail offered a way to allow for more initiatives in a change program:

'It is the tooling, it means asking questions a lot, coaching people, supervising them and for the while being approving everything. It is about getting people to move.' (Informant 26)

In this context, some interviewees referred to a 'hundred flowers' approach through which they hoped to encourage differing views and interpretations:

'So, in your approach [you can choose between] extensive and encompassing versus letting a hundred flowers grow. It is more a 'hundred flowers' approach [here] and the people do like that in general. But at the same time it makes them a little insecure and restless

> *because we do get the question what does the organization want with this [Lean]? What is the policy, what is expected from me and what am I to do about it? So beautiful flowers that blossom, but that will then also want a little fence and soil and water and sun. So we do have to take care of that and that is what we are doing now.'* (Informant 33)

Other interviewees indicated that instead they would not only rally 'controversial' interpretations under the Lean label, but would also not apply the 'Lean' label to interpretations they did see as fitting the concept, in order to not disturb the enthusiasm by tainting the initiatives with management speak:

> *'It fits me personally to help people at an individual level, to help make them become champions and to convey the message. As far as I am concerned I don't need to call it Lean all the time.'* (Informant 14)

Simple speak - The labeling of the concept in this mode also entails incorporating simple speak in defining the concept. By using basic language and by framing the concept as fairly straightforward, implementation managers connected higher-level management and work-floor professionals around what the concept would look like in practice:

> *'I thought it was important that if you are going to back it up, it has a theoretical motivation, but preferably in laymen's terms, because otherwise people will not understand it. We did just do it like that, so instead of the value stream at a nursing department we said guys, there is an urgency to change.'* (Informant 14)

Channeling

Matching superficial understanding - Implementation managers stressed the significance of matching superficial understanding and meeting extant expectations in bridging the concept between higher-level management and work-floor professionals. On the one hand informants made sure that different hierarchical levels were brought together around similar, yet superficial understandings. This generally entailed that implementation managers organized physical meetings between higher-level management and work-floor professionals where Lean expectations were made visible and were celebrated. One informant illustrated this by explaining how she to invited higher management to an event where employees were going to pitch their cases:

> *'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 an 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 of the ideas and initiatives in the first place, so it is also in their interest that these people also have a good presentation to start with.'* (Informant 44)

Meeting existing expectations - On the other hand informants noted that in this bridging mode, they would also address diverging expectations, emphasizing how they are not mutually exclusive, but compatible. By meeting extant, yet unshared, expectations, implementation managers found support to continue with Lean. One informant noted that how decreasing stock addresses both the time-saving expectations of nurses and the financial motives of management:

> *'We started with one department as a pilot in order 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 44)

(2) Buffering

When endorsement has been secured and management and work-floor professionals are directly or indirectly experiencing Lean, these parties are, to some extent, starting to understand its workings in practice. Initial enthusiasm is met with more conscious reflection of what the concept entails. Conflicting explanations and implications arise, as different parties develop their own interpretations. To address this, implementation managers engaged significant efforts to facilitate unhindered quasi-independent meaning-making (Reay et al., 2013). Such independence generates space for a multitude of applications with which parties can experiment and interpret the concept in a way they see as meaningful. To accomplish this, implementation managers *positioned the concept* through inducing ownership and concealing initiatives. They stressed the significance of replacing dysfunctional *labels* and juggling conflicting story lines and they *channeled interpretations* by enabling separate understanding and negotiating realistic expectations. As opposed to 'bridging', implementation managers shifted their approach by positioning themselves in between both parties. We called this mode 'buffering' as boundary spanners deliberately disconnected (buffered) possible conflicting interpretations to allow for quasi-independent meaning-making and conscious reflection that would not have been compatible with the simultaneous interpretations, efforts and experiments of others. The micro-practices associated with this 'buffering' mode are described more elaborately and illustrated below.

Positioning

Inducing ownership - Having secured endorsement (bridging mode), informants expressed that now they are confronted with people who don't really know what they said yes to. This gives leeway for implementation managers to proceed as they see fit. Lean comes to be positioned in the organization as a program or a project. Our informants indicated that they employ practices aimed at inducing ownership among the different parties involved. They are not just trying to generate enthusiasm by showing off compelling examples, but also to get parties to embrace the concept beyond a formal involvement or superficial enthusiasm. For example, one informant specified that she had to 'really show' what the trajectory would look like after gaining initial endorsement:

> *'He [previous project manager] managed to convince them, but they really don't know what they said yes to and in the course of the years, when I started as a project leader, I lobbied with different departments and really showed them what the trajectory would look like and this is what is expected from you. I also did that with all the other staff members involved, the head of general support services, head of technical services, it could be that you get this*

and that question. In the end I spoke with about a hundred people before we really got things started.' (Informant 17)

Concealing initiatives - As implementation managers aspired for different parties to truly embrace the concept and to engage their own 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 while doing so. By concealing initiatives, informants facilitated processes of sense-making and conscious reflection in relation to Lean across organizational boundaries. An informant explained how she intentionally kept distance from her managers, as she was concerned they would draw premature conclusions before really understanding the concept's meaning:

'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 do we spend on what and how many hours do we spend and how productive are people? 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. It was sensitive, because, as we measured we found out that some were more productive than others and if I would have taken that to my managers, I was afraid they would draw their conclusions and that there would be consequences.' (Informant 25)

'Once you have a certain critical mass, then you are able to generate a movement. That is what we are doing now and we did not coordinate that with a lot of people. But now you see in different management contracts with the board of directors that divisions want to do this [Lean] and I get to keep doing it. I think if we had done this through the official channels we wouldn't have been allowed to do it.' (Informant 20)

'For gaining a broad support base you do need a top-down structure yes, I think, if, in 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 its dead in the water, I will not do it like that. So, concerning that I have really been stalling things, I think

the leadership aspect in Lean might be the most important aspect, so I have prevented us to get to start too soon with continuous improvement and improvement boards and all these pretty visual things on the outside.' (Informant 33)

Labeling

Replacing dysfunctional labels - 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 engage in a practice of replacing dysfunctional labels; labels that are found to be unproductive by specific stakeholders in their interpretation of the concept, in terms of the language for getting things done. As different parties are starting to make the concept locally meaningful, some of the vocabulary appears to be problematic and does not correspond to 'the way we do things here'. Additionally, conscious reflection after initial enthusiasm causes disappointment, tainting the terminology. By modifying the Lean vocabulary by getting rid of poorly received labels, informants allow stakeholders across managerial and professional boundaries to engage their own interpretation:

'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 mean time 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 20)

'Words like 'poke yoke' [a mistake proofing technique] and what have you… we have decided not to use that here. We do use the word 'Gemba', we use the word 'work visit' and 'Gemba' between brackets. But there was such deep-rooted antipathy against the use of these Japanese words that we took that out. That is one of the things we agreed on.' (Informant 15)

Juggling conflicting storylines - In facilitating different parties to develop their own interpretation of Lean, implementation managers also juggled conflicting story lines each with their own logic to frame the concept as meaningful to diverging local applications. One informant identified how at the same time she was juggling 'Lean as a philosophy' among work-floor 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: '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 16)

In a similar vein, another informant expressed the difficulty but necessity of working with 'different stories' and the need to reframe 'Lean as a business case' in a more positive narrative to gain access at specific departments:

> *'Using it [Lean] in a cost-cutting operation is not very practical. They [board of directors] didn't say that, but they did say 'we can use you'. So our experience in the organization is that when we arrived they [the work floor] said 'that is because we need to cut down'. Should the board have said sooner that things were ought to be different and that departments had to merge and we are flying in Lean people to do this together, that is an entirely different approach than when you say 'departments have to merge and we need to do that next week'. . . . It's a different story than when you think about the best way for everybody. Yes, Lean elements were included but very negatively framed. They had let go of fifty people at the [departments] and then they expected me to address the organization. At the moment I come in, I was not welcomed with open arms. Even though they appreciate you coming to help them, they will say: you are only here to help make the budget cuts'.* (Informant 21)

Channeling

Informing - In this buffering mode, boundary spanners engage a micro-practice which we called ‘informing to enable separate understanding’. They aimed to establish conscious reflection among different stakeholders through unhindered quasi-independent meaning-making, but they do indicate the necessity of keeping different stakeholders informed about the progress of others precisely to avoid further interference. For example, one implementation manager described how she had progress reports compiled to communicate work-floor initiatives to the board of directors:

> *‘Every month . . . I ask everybody to make a progress report according to a fixed format, what are your successes . . . so I can inform the board of directors about it, so that they stay involved.’* (Informant 13)

Similarly, another implementation manager notes that he would inform his board of directors by ‘giving them just ten PowerPoint slides’ to keep them updated and satisfied:

> *‘Because actually, and that may sound a bit strange, I was the only one to decide where the program was headed 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 about it, but I did that afterwards. You know, so it’s still a habit to report to the board of directors about the output of the program. That’s how it works, 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 36)

Negotiating - Next to informing to enable separate understandings, informants noted that in this buffering mode, they would also negotiate more realistic expectations by having stakeholders reflect on additional or alternative interpretations. As Lean has led both to some tangible successes as well as to some sobering experiences with projects running into difficulties and people making mistakes while doing so, implementation managers have some leverage to negotiate alternative approaches and interpretations. By putting alternatives on a par, implementation managers try to negotiate a more realistic approach in order to continue with Lean. 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 the directors:

> *'Well that was because of the board of directors, we improved financial results, because we addressed that very carefully. We were able to manage that [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 a number of 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 to account 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 22)

(3) Blending

When management and work-floor professionals acquired some experience with Lean, learned to work with it, and applied and interpreted it ways they saw fit, meaning-making and action remained at local levels. Implementation managers noted that for making initiatives last, and addressing experienced shortcomings, collective meaning-making and action are necessary:

> *'Just bottom-up does not work, you need to have top-down as well. And I think it is a good thing we are now combining efforts and joining forces, that we are making bottom-up and top-down really connect to one another.'* (Informant 20)

To accomplish this, implementation managers *positioned the concept* by connecting ownership and by going public with extensive initiatives and not just superficial successes. They stimulated a common and coherent discourse in which idiosyncratic and local *labels* were centralized. Also, implementation managers *channeled interpretations* by provoking reflection for shared understanding and by creating shared expectations. In doing so, implementation managers once again connected the meaning-making of higher-level management and work-floor professionals. We called this mode ‘blending’ as boundary spanners deliberately merged existing interpretations and reconciled conflicting views by connecting parties through active reflection, which exceeds the meaning-making at local levels. This is in contrast to a bridging mode where parties are connected by matching superficial understanding, and contrasts with the buffering mode where conscious reflection is restricted to local levels, keeping meaning-making deliberately separate. The micro-practices associated with this ‘blending’ mode are further detailed below.

Positioning

Connecting ownership - As Lean has come to be embraced by different parties involved, invoking idiosyncratic interpretations and more realistic expectations, implementation managers find momentum to connect the interpretation of Lean across professional and managerial boundaries and we find that Lean comes to be positioned in the ‘line’. Our informants indicated that in doing so they employ practices aimed at connecting ownership among the different parties. They are trying to generate collective meaning-making based on realistic expectations. As one of the informants specified:

> *‘I will still be doing Lean, but not as a program anymore, because we have done that for three years and now it is time for it to be carried by the line organization and not by a loosely couple program office.’* (Informant 16)

> *‘I am someone with a bottom-up approach and I am a big doer. So I think it is all right to do it like that, but just bottom-up doesn’t work, you also need to have 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 that I want and you don’t achieve that just like that. So you have to get people in the right mindset to want that.’* (Informant 20)

Going public - Whereas before, implementation managers protected vulnerable initiatives from too much outside scrutiny, in the blending mode, informants indicated that they would ‘step out of the shadow’. By going public, implementation managers were opening up real initiatives for collective interpretation. An informant explained how he experienced this mode as a very exciting adventure and one that was not without risk for the viability of the concept, but necessary for its survival in the long-term:

> *'Over time [with Lean] we got bigger projects, more care related, projects giving meaning to the care process. Then, when we were under increased supervision, I did the [project]. I was a very big adventure. . . . We had to come and talk about it, everybody wanted to know about it. And it was one of the things we were under increased supervision for. I was really put under the microscope. The short version: it really contributed. We received a 'thank you' letter from the board of directors for the contribution. Lean got a positive turn and we were no longer under enhanced supervision.'* (Informant 30)

Labeling

Replacing labels - Our informants suggested that to achieve blending, replacing labels to fit the context allowed for interpretations that united different parties. Whereas loose labeling in the bridging mode entailed broad and simple labels that allowed for conflicting interpretations becoming too obvious, here implementation managers reframed the initiative with organization specific labels to fit the local context that came about through conscious reflection of really engaging with the concept. 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 being told to do something they won't do it. We are looking for ways to improve. That was the starting point of 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 'Excellent [hospital X]'. We no longer talk about Lean or Kaizen or Six Sigma; we try to veer away from that a little.'* (Informant 26)

Stimulating common discourse - In line with this, implementation managers were also found to engage in stimulating a common discourse. By unifying the discourse of Lean around the strategic orientation of the organization implementation managers connected higher-level management and work-floor professionals:

> *'That is one of the sharp things we agreed on. Either the choice for A3 and not Kaizen or the five basic principles, and we will mention 'flow', why? Because that is used a lot on a national level. 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, then there is a big chance that we don't end up at our goal or destination. That is how literally we will explain things and the connection to our core values of the hospital. . . . And it was really clear when we restarted [with Lean] we clearly specified, Lean should be in everything. So now we have it in our appraisal interviews, it will be in our vacancy ads and in our introductory program, that's new, Lean will also be an element.'* (Informant 15)

Channeling

Provoking reflection - In this blending mode, boundary-spanning implementation managers engage in a practice, which we called 'provoking reflection for shared understanding'. As our agents aim to connect interpretations they explain how they open initiatives for reflection and collective interpretation (see positioning). Instead of keeping stakeholders informed about the progress of others, here we find implementation managers actively inviting interference. For example, one informant specified that she is taking the board of directors to the work floor to show them the real system and not just the things that look nice:

> *'I feel as if I am the problem owner, but I wish it would be the board of directors. In theory that is the case, but in practice not really. I worry much about what would happen if I would leave . . . I am doing all kinds of activities with them, to make sure that they understand what it really means continuous improvement. . . . Taking them to the departments where you really see the system of improvement. Not just the [improvement]*

board or some nice initiatives. Really, the system that will also continue when the coach has left. We spend a lot of time doing it, but I can't really say they are owning up to it. If I do nothing, I don't think a lot will happen.' (Informant 10)

Creating shared expectations - Informants noted that in this blending mode, they would also create shared expectations, going beyond initial compatibility, and rather construct alignment and similarity in what different stakeholders are expecting from Lean. By unifying expectations of Lean toward the strategic orientation of the organization, implementation managers gain support for a durable Lean. One informant indicated that by encouraging divisions to incorporate Lean as a means to address the obligations of the board of directors, it in turn became one of the criteria for higher management to hold divisions accountable to:

'Every year each division receives a framework letter (kaderbrief) from the board of directors in which is specified what they are obliged to do next year. And then the division has to draw up a management contract in which they answer how they are planning to do this and that is what they are held accountable for. . . . And what we see now is that they will be organizing a Yellow Belt [Lean training] to achieve continuous improvement . . . These contracts lag a year in that sense, but now we see it recurring there and in the meetings they have with the board of directors it keeps coming up. All divisions meet with the board of directors to discuss the management contracts so we really see that becoming the talk of the town.' (Informant 20)

Table 3.2 ***Additional examples of data***

(1) Bridging	
Positioning	***Securing endorsement (pilot)*** • *'Because everybody [participants in the training] was supposed to hand in a case and the business managers had to sign them. They are [problem] owner and this Green Belt is now as a facilitator going to help you solve your problem. . . . And it is likely that it is one of their cases, because all these managers have signed off on the problem, so they also have a stake in having these people giving a good presentation.'* (Informant 14*)* ***Communicating success*** • *'We have a little video clip in which we ask a nurse to collect all the things she needs for the insertion of an intravenous catheter.*

	You can't stop laughing because it will take her so much longer to look for all the stuff than to do the actual insertion f the catheter. It is hilarious and if you see that you will think 'what a waste' and everybody will recognize it and that is how we get the doctors to be enthusiastic as well.' (Informant 10)
Labeling	***Loose labeling*** • *'We will effectively use the communication tools available and we will frequently post something about Lean. And we don't always call it Lean, we will also call it process improvement. Because otherwise people will say 'Jeez Lean' [makes disapproving sound]. That is how we try to sell it to them, the philosophy.'* (Informant 23) ***Simple speak*** • *'But at that value stream analysis, we will just do it. We choose one process and put a piece of brown paper on the wall and then they will learn as they go what we mean by it. That doesn't require too much explanation, so that goes pretty well like that.'* (Informant 14)
Channeling	***Matching superficial understanding*** • *'That voluntary basis was a main key to success. These people are doing nice things and get a lot of positive PR. The board of directors has lunch with them every week and asks them what they are doing with Lean. It is always on the intranet, last year we had the best idea of the year. We are doing all kinds of very low-profile things.'* (Informant 7) ***Meeting extant expectations*** • *'I think it is both, small projects that will get to the hearts of people and a couple of projects on flow, in which the benefits to the patients become clear.'* (Informant 4)
(2) Buffering	
Positioning	***Inducing ownership (program or project)*** • *'This story, what I am showing you now, he was the one telling it in a workshop for which we invited somebody from the USA. I completely prepared that with him so that it became his own story. That has been very important, that it became something that was his too.'* (Informant 10) ***Concealing initiatives*** • *'[The fact that it had no status] was powerful in the sense that I had more space of maneuvering to work with Lean outside of the formal channels, because it had no formal status. . . . Lean still had to prove itself and that took three years, and then we assigned it a formal status.'* (Informant 3) • *'So first at general support services we provided workshops. We developed our own game, so we went through the organization to*

	spread the message a little [laughs] and to talk to others about the philosophy. We realized that it made a lot of people happy so we created our own demand. So we did act beyond our remit a little, outside our job description, but we loved doing it.' (Informant 3) • *'From the medical board they were paying critical attention. There was no stable management situation and we were in no one's way as long as we didn't stand out, in a negative, but also in a positive sense. It was fine that we had a small budget and three people who did it [Lean]. The board had to grow in it and the trust had to grow as well. They had to learn what it meant.'* (Informant 30)
Labeling	***Replacing dysfunctional labels*** • *'For a long while no one wanted to use the word Lean. And I also avoided using it. So we started to work with the flow concepts and then people would say 'that's Lean, isn't it?' and then it seemed all right again. And the same with the board of directors, they told me, don't mention it, because we don't want the hassle'.* (Informant 4) • *'We have called that 'colorful improving', because Lean was such a difficult word. Initially that was really about productivity and about being more productive and really focused on standardizing work, and we suffered from that in the department. . . . Lean was a difficult label so we thought about what would suit better. We started with balloons and ended up with 'colorful improving'.'* (Informant 25) ***Juggling conflicting story lines*** • *'We are really on our way to give 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 actually, a search for how do we do this? How do we connect these two worlds?'* (Informant 26) • *'Yes of course, they [board of directors] will choose methods with which they can meet the goals of the organization. It's a strategic decision. . . . We have talked about it . . . , no, it can't be financially driven, yes okay, but you know what, that's not how it is. Why did Toyota start to do it? Yes, it is the client and the patient who is central, but in the end it is the board of directors, especially in these times, and the financial basis. . . . But on the work floor we didn't talk about it with our people . . . we present is as: the first goal is problem-solving capability and the second goals is process improvement. That's how we communicate it to the consultants and the management, but I don't think all employees will know it like that.'* (Informant 18)
Channeling	***Informing to enable separate understanding***

- *'And actually, I have been really raising arms with the care group managers. It is lobbying, a political game. Everything works by visualizing; this is what we have accomplished, we have made everything as smart as possible in order to provide hard information and figures. But the danger is that they are now asking for these numbers more and more. But we had to do it to convince them of what it was going to deliver them. Especially to the board of directors and the medical staff.'* (Informant 17)
- *'I see the movement of our board of directors at this moment in time. They are very straightforward in saying 'this is what we are investing, what are we getting out of it'. And there are a lot of things of which I think we deliver but are really difficult to put into numbers, into their KPI's [Key Performance Indicators]. An example, if I see that because of the day start instrument . . . the cooperation improves so much, then that is a clear result, but it cannot be translated one-to-one into a KPI or to money. And that is making it such a challenge in healthcare, how do you put a number on what you achieve, because they do ask for it . . . you cost money, but what do you have to show for? And if I then answer with my holistic team approach, how can I sell it to them. And I really do not know how much patience the organization will have to give it a chance. I am curious and concerned.'* (Informant 10)
- *'We need their approval [board of directors] because of the hours and the capacity. On the other hand it is a little bit of informing and communicating so that they know what we are doing. And we have stated what we are doing until now and where are we. To get on the radar again. Is has a dual function.'* (Informant 23)

Negotiating realistic expectations

- *'Our [member of] board of directors is a believer of healthcare logistics. He is a pretty analytical person. I told him that I would like to invest in the process, attitude, behavior and the problem solving capabilities of people as well so that these two [Lean and healthcare logistics] come to reinforce one another. So next to giving [n] people a master class healthcare logistics, we also trained [n] people to become a Green Belt. And we asked them to bring a case, preferably a case on healthcare logistics and to improve on that, because we have to prove this really works . . . I put it on a par with healthcare logistics, because that is a hard side approach, a very conceptual way of putting it and really top-down as well. I would like to have other people that might not have the analytical skills, but who are very capable of setting in motion a culture of change.'* (Informant 14)
- *'So the board of directors is aiming for 'A' [refers to process optimization and using Lean as a toolbox] and the quality manager*

	[refers to agents in boundary spanning position] personally, and because of the influence of the network, believes in ‘B’ [refers to Lean as a way to establish continuous improvement], but has to do ‘A’ from an organizational perspective, but tries to introduce as much ‘B’ as possible. . . . Then you see that shift in a lot of member[s] [hospitals], that it is starting to become more equal and bigger.’ (Informant 3)
(3) Blending	
Positioning	***Connecting ownership (line)*** • *‘We don’t want to approach that as a program anymore, because really it is something you nee to do collectively. Not something to have in a program. It should be embedded in the line and that is why I favored this to be positions under the directorate of ‘quality and patient safety’, But now we do have to go look for the road we want to travel.’* (Informant 20) ***Going public*** • *‘Nowadays we have a waiting list for doctors who want to do the [Lean module] . . . initially having these 5 doctors with us, that was a strong move towards the board of directors to make them hear the positive sounds of the doctors. That they are in favor [of Lean] and would publicly support it. In that time we made it happen to get [Key Performance Indicators (KPI) boards] that were being advocated by the board of directors and that makes that it more binding to others who were not so much in favor. So we have managed to achieve some critical milestones that have really caused a change in attitude towards the philosophy [of Lean] in the organization.’* (Informant 30) • *‘By inviting outsiders [through a Gemba walk] you create some unrest in the organization. The board of directors does not know where these people are from, are they from outside of the organization? And why is that? Because we are doing a good job? That is how I want it to make it come alive in the organization as well. That it is not just going from bottom to top, but also from top to bottom.’* (Informant 13)
Labeling	***Replacing labels to fit context*** • *‘Actually we have designed and developed all courses and trainings ourselves. . . . The three basic modules as process modules we have completely designed ourselves. We did deviate from the English principles more and more, because they didn’t quite match the Dutch practice. Especially the terminology and some of the principles as well. In Productive Ward they will talk about 12 steps and that is just not realistic in our practice. We have focused entirely on the ‘hairdryer’ [improvement cycle], which we have based on six steps we have based the training on.’ . . . We*

have started to work with this 'hairdryer' on an individual basis and that is how you see it evolving. That is what I set out in a PowerPoint presentation as well: what has it done with u as an organization and where should we go next. To present that, in turn, to our new board of directors.' (Informant 30)

Stimulating common discourse

- *'We had different things: Care paths, productive ward and Facility management [doing Lean] . . . But all of them, all these three are insufficiently anchored in a total concept. . . . From three directions we have messed around with Lean, we did fun stuff and made people enthusiastic, but now we need to get to a new plan for the new organization. That would be the first step and we need to get that rolling. . . . It will be exciting times, can I get that plan though yes or no, but I will maintain that we need to combine these three elements to one Lean.'* (Informant 34)
- *'And resistance, yes that happens, because we are not the only player in the field, it is the masses who will be changing it. We have committed to language, because how else can you find out something by Googling it? Then you have to know the word that is being used internationally. Lean and Mean will pop up every now and again and when we have cut backs we have to pay attention, because unfortunately that is the case, that it is not associated in the wrong way.'* (Informant 5)

Channeling

Provoking reflection for shared understanding

- *'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 in our development.'* (Informant 6)

Creating shared expectations

- *'Well we had a lot of contact with the board of directors, and they were really part of it. But there was no clear vision of where they wanted to go. It was more like; 'we want to have better results; we want to have a 20% efficiency improvement on all processes. Well that is not a direction. Yes, it seems nice, but where are we going? That wasn't there and for then it was fine, but now we are at a crossroad at which it will be necessary and it will have to happen. [And] I encourage it [having the board of directors using it as a criterion to hold others accountable], because it is part of my job, but I believe that if you really want to implement Lean in your organization you have to. Because everybody has to feel that we* *are curious to how you use it [Lean] in your work and how you battle waste and how you realize that you put the client value first . . . and you really create that cooperation, because the board of directors will ask you in the quarterly meeting where you are in the application of Lean.'* (Informant 20)

The modes of buffering and blending are similar to translation efforts identified by Huising (2016), where managers buffered their organization from extra-local language and symbols and blended extra-local ideas with local practices as they 'inhabited the idea'. Although Huising (2016) was studying how managers introduce and enact novelty in organizations as they move between the 'extra-local BPR community' and the local organization, we similarly observed efforts to translate the idea across intra-organizational boundaries. Huising (2016) however, collapsed buffering and blending under a single stage, with limited analytical distinction. In contrast, we abductively organized variation into separate modes to represent ways of acting that can be favored and actively employed by agents as a function of contextual conditions and strategic orientations.

3.6 DISCUSSION

This study aimed to provide insight into how key intermediate actors translate management concepts across professional and managerial boundaries. We identified three general practices that intermediate agents engage to translate the concept of Lean across internal organizational boundaries. Also we showed how specific micro-practices vary as a result of their strategic orientations in bridging, buffering and blending modes. Our study identified that including boundary spanners as analytical actors helps to develop a richer understanding of the intra-organizational dynamics across organizational boundaries in the translation of management concepts. In what follows, we detail a number of key implications of the present study for the research on the translation of management concepts.

First, prior literature on translation literature generally reflects a spatial metaphor with a unidirectional, top-down logic where concepts and ideas are given new meanings as they 'trickle down' from higher to lower levels, thereby focusing primarily on the role of executive managers in enrolling others to their cause (Reay et al., 2013, p. 983; Zilber, 2006). Such a perspective has limited our understanding of micro-processes of meaning construction and negotiation (Gray, Purdy and Ansari, 2015), and we contend that a closer focus on intermediate agents, as translators between different stakeholders, may provide a more dynamic view of translation (Fauré and Rouleau, 2011; Radaelli and Sitton-Kent, 2016; Rouleau and Balogun, 2011; Spyridonidis and Currie, 2016; Teulier and Rouleau, 2013). However, extant literature provides little detail on what these agents actually do in practice as part of their core responsibility (Balogun et al., 2005; Radaelli and Sitton-Kent, 2016; Spyridonidis and Currie, 2016; Teulier and Rouleau, 2013). We show that the translation efforts of key intermediate actors reflect continuous translation efforts, back and forth across professional and managerial boundaries. As such, our study urges future studies to spend more attention on the pliable and distributed character of translation processes, and to go beyond the emblematic perspective by which higher-level meanings are translated to lower levels in order to advance our understanding of the complex dynamics of organization with meaning-making as cyclical and iterative processes.

Second, we contribute to the literature on the translation of management concepts by stressing the significance of the specific role that intermediate agents as a 'third party' may have. In our analysis we found an important contrast between the buffering and 'connecting' (bridging and blending) orientations that these agents hold in introducing the concept of Lean across organizational boundaries in the hospitals under study. Our study illuminates how buffering is a significant, yet paradoxical and under-theorized part of translation. This is in contrast to prior literature on translation that primarily conceptualizes alignment in relation to the efforts of connecting different meanings by making them mutually compatible (Latour, 1986). While the agents under study did indeed encourage a connection of initiatives and meaning-making across organizational boundaries, we found that these boundary-spanning individuals carefully balanced bridging and blending with a mode of buffering. Indeed, translation studies have been targeted for overlooking that 'much behavior in organizations occurs with little conscious reflection on its continued appropriateness, even when interests change' (Gondo and Amis, 2013, p. 230). Gondo and Amis (2013) expose an interesting institutional paradox: 'the very thing that makes a practice more easily accepted also reduces the conscious reflection needed to implement it' (p. 230).

In contrast, our study shows that boundary-spanning agents may not so much be confronted with such a paradox, but instead actively draw upon the difference between mere acceptance and conscious reflection in their attempts to make the concept locally meaningful. We show that *bridging* may be an initial and intentional mode of translation where the meaning-making of higher-level management and work-floor professionals is connected without too much reflection on what the concept may entail and what is needed in terms of active involvement on their part. In a *buffering* mode, boundary spanners do aim for conscious reflection among different stakeholders, but conscious reflection is restricted to local levels and not extended to what is happening elsewhere. Thus the parties involved are disconnected to engage in unhindered quasi-independent meaning-making. In a *blending* mode, boundary spanners aim to connect the meaning-making of higher-level management and work-floor professionals by merging existing interpretations and reconciled conflicting views through conscious reflection, which exceeds the meaning-making at local levels. Attending to underlying strategic orientations predicated by the 'tertius gaudens' and 'tertius iungens' distinction, clarifies how translation efforts and micro-practices may shift as a function of the strategic orientations of key agents mediating organizational boundaries thereby contributing to our understanding of agency in translation. Further research on the translation of management concepts should then take into account that the conscious reflection needed for meaningful implementation requires a necessary, yet paradoxical mode of buffering. At the same time, the mechanisms involved in buffering are in need of closer exploration. It might be the case that the interpreting the concept in terms of concrete practices and applications—instead of ideologically fused perspectives—may be what yields the necessary trust and commitment for conscious reflection and for opening up to the interpretations of others, but we encourage other scholars to closely study the exact workings of these mechanisms.

Third, our study also contributes to the literature on the translation of management concepts by further clarifying how micro-practices in translation are simultaneously a function of general, embedding 'editing rules' (positioning, labeling and channeling) but also of the strategic orientations of key agents. Sahlin-Andersson (1996) suggested that translation processes follow three steps as governed by three different editing rules. Editing rules changing the context refer to the de-emphasis or omission of local features that were specific to the setting in which the concept originated. The second set of rules concerns formulation as concepts acquire language and labels that are more fitting of the context of application. A third set of rules concerns the logic through which the new story is constructed (see also Sahlin and Wedlin, 2008). This idea has been used extensively to understand the way in which ideas and concepts become embedded in new localities, with editing rules shaping varying potential for agency (Kirkpatrick, Bullinger, Lega and Dent, 2013). However, prior literature provides little detail about the way these editing rules are performed in practice and the conditions that shape this performance (Bartel and Garud, 2009; Morris and Lancaster, 2006; Nielsen and Jensen, 2011; Teulier and Rouleau, 2013). Also, limited attention has been paid to how editing rules in practice might be a function of the agency of actors and may come to vary as a result of their strategic orientations.

We see significant similarity between our inductively derived practices of 'positioning', 'labeling' and 'channeling' on the one hand, and the notion of editing rules (1996). Based on our findings, we argue that the orientation of key intermediate actors, spanning professional and managerial boundaries, is an important factor in specifying the nature of editing rules and in shaping the micro-practices they use. In other words, bridging, buffering and blending orientations are important in defining the nature of editing rules. In particular, we showed how the orientations of key agents shaped these 'rules' into specific micro-practices. For example, we showed how 'labeling'—which coincides with formulation rules—changed from loose labeling and simple speak (bridging) to replacing dysfunctional labels and juggling conflicting story lines (buffering) to replacing labels and stimulating common discourse (blending). In this sense, our findings are consistent with the general idea of editing rules shaping translation practices, while offering a more nuanced view of how these editing rules interact with different modes of strategic orientation—of key intermediate actors spanning professional and managerial boundaries (bridging, buffering and blending)—in shaping these practices. Thus, further research should be encouraged to allow for a conceptualization of translation and the micro-practices involved, as a function of both general, embedding 'editing rules', but also of the strategic orientations of key individuals. Naturally, our study is also relevant for the micro strategizing literature that focuses on middle management agency. In showing how editing rules interact with different modes of strategic orientation (bridging, buffering and blending) in shaping micro-practices, we also further our understanding of the roles of middle managers (or boundary spanners) in strategy implementation and renewal (Balogun and Johnson, 2004; 2005; Mantere, 2008).

Limitations and suggestions for future research

Despite the theoretical and practical contributions of this study, a number of limitations should be taken into account. First, we suggest that a buffering mode is critical in understanding how boundary-spanning agents translate concepts across organizational boundaries, but it may be questioned to what extent intermediate agents will be able to buffer higher-level management from work floor initiatives and mistakes in settings with more top-down organization. Hospitals are complex organizations where it is difficult for higher-level management to impose change based on hierarchical position, resource control or expert knowledge (Radaelli and Sitton-Kent, 2016) as medical professionals are powerful and can easily resist changes (e.g., Currie et al., 2012; Ferlie et al., 2005; Kellogg, 2009). Whereas the specific organizational conditions typical for this hospital context may further the debates about the practices in other settings, future research should be encouraged to examine whether and how the micro-practices of key individuals to translate a concept within organizational boundaries also hold for less professionalized settings.

A second limitation concerns our focus on specific actors, namely nominated boundary spanners (Balogun et al., 2005). By focusing on nominated boundary spanners our focus may have been limited as many other employees will embrace change and may take responsibility for enabling and managing it. Furthermore we have relied on the interpretations of the informants and we did not interview those with whom these boundary spanners interacted. Even though we have sought to validate the findings by systematically comparing their views with each other and different sources of data, these concerns might be addressed by follow up research undertaking a closer inspection of the change participants, in different roles, across the boundaries involved. In doing so, process research with real-time observations and interviews and different points in time, would be highly insightful in the further exploration of agency in translation.

Third, by focusing on implementation managers as boundary spanners, our study renders visible actors 'who may have significant influence on the translation process, [but who] have not been subject to any systematic analysis of their role' (Radaelli and Sitton-Kent, 2016, p. 2). And we address the practices of these actors to translate innovations across internal organizational boundaries around which literature is sorely lacking (Balogun et al., 2005; Spyridonidis and Currie, 2016). However, by focusing on the role of implementation managers as translators between heterogeneous stakeholders, we actually define these key agents in terms of the position they hold in between professional and managerial boundaries. As 'tertius gaudens' or 'tertius iungens', they represent the 'third one' to close or maintain the gap between disconnected others (Kellogg, 2014; Tortoriello, 2010). Yet, in taking a boundary spanning perspective it may be questioned to what extent we are really contributing to a closer examination of the people involved, or if such an approach instead obscures them from view. An interesting question arises from this confound. Who are these boundary-spanning individuals outside of their relationship to others? And how might their identity impact translation? More thorough research on this question is certainly called for.

3.7 CONCLUSION

In this study we aimed to provide an analytical model to understand how key intermediate actors translate management concepts in organizations. Specifically, by drawing on a perspective of boundary spanning our approach stands in contrast to conceptualizations of translation which reflect a unidirectional, top-down logic in which meaning-making ‘trickles down’ from higher to lower levels. By focusing on the micro-practices of boundary-spanning agents, we address the dynamics of inter-organizational translation and show that the translation of concepts is a function of general, embedding ‘editing rules’ (positioning, labeling and channeling) but also of the strategic orientations of key agents mediating organizational boundaries. We also show that these practices may reflect an effort to buffer meaning-making, with the paradoxical intention of creating alignment in the end.