

# **Collaborative Management Research as a Modality of Action Research: Learning from A Merger-based Study**

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# **Collaborative Management Research as a Modality of Action Research: Learning from A Merger-based Study<sup>1</sup>**

## **Abstract**

The practice of action research has been an integral element of organization development (OD) research since the beginning. Collaborative management research (CMR) is viewed as a modality within the broad family of action research approaches. By design, CMR aims to facilitate collaboration between researchers and practitioners in the investigation of an organizational issue while generating outcomes that are both relevant to practice and scholarly rigorous. This article reports on the nature and outcome of a collaborative management research effort that centers on a complex organizational change - the merger process of two real estate investment companies. The discussion identifies and explores some of the characteristics of CMR that could enable M&As. Contribution to theory, methodology and practice are then presented, proposing CMR as a managerial tool for framing and leading M&As.

**Key words:** Action research, Collaborative management research, Mergers and acquisitions

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## INTRODUCTION

“I was hired as an outsider to lead the merger of two successful companies located in different regions of Italy. This is one of the biggest challenges that I have ever faced as a CEO. Do you know of any blueprint for action that can guide me?”

This conversation took place between a CEO and a researcher while enjoying a cappuccino in an Italian coffee bar. The CEO, with previous successful CEO roles in three other companies, faced a new challenge for which he had no managerial solutions nor scholarly answers. Coupling his wide CEO experience and expertise in finance, he was targeted for the job by the chairman of the board. He had no models for action to follow. The researcher immediately saw the possibilities of both assisting the CEO in his challenging practical task and generating useful knowledge about how a merger process can be enhanced and may be managed.

Mergers and Acquisitions (M &As) have received increased attention in organizational and management studies. A review of the scholarly literature suggests that the majority of the studies tend to be prescriptive, since they not only describe how M&As take place but also what ought to happen or what ought to be done. Post-merger and acquisition performance data suggests that most M&As do not meet expectations (Schuler & Jackson, 2001; Marks & Mirvis, 2010). Furthermore, research shows that less than 50% of M&As succeed (Gill, 2012). A problem of practical usefulness of the available scholarly knowledge production process is that making the case for the use of traditional academic research in helping management teams lead mergers is difficult and questionable. The premise of this article is that an action research orientation might provide a more suitable alternative.

Over the past sixty years or so the practice of action research has been an integral, though often neglected, element of organization development (OD) research (Coghlan, 2012). It has been central to the OD tradition that scholarly researchers and practitioners work together to address complex issues of organizational change (Shani & Coghlan, 2014). Collaborative management research (CMR) is a modality within the broad family of action research

approaches. The process of organizational inquiry is characterized by methods that are based on varied degrees of *action* and *collaboration* that were advanced during the last (and the current) century, each of which seems to emphasize distinct scholarly, collaborative and action features (Shani et al., 2008, 2012). The nature of the collaboration and action embedded in collaborative management research - in its process that involves iterative cycles of identifying a problem, planning, acting, and evaluating and in the nature of relationships that it develops - makes collaborative management research a promising approach for theoretical development and guiding practice for M&As. Collaborative management research approach in an M&As context could be useful because, instead of focusing on defining the success factors, it focuses on how the M&As works and how to make it work while it's happening.

Designing for and facilitating organizational learning process is at the foundation of most OD interventions (Docherty & Shani, 2008). The establishment of organizational routines to manage this learning is then fundamental (Popper & Lipshitz, 1998, 2000). Organizational learning mechanisms - being institutionalized arrangements that allow organizations to systematically collect, analyze, store, retrieve and use organizational knowledge - are key when dealing with complex organizational transformation and OD interventions (Shani & Docherty, 2003).

This article is embedded in a collaborative management research project conducted in a company that had recently undergone a strategically driven merger within the real-estate investment industry context. Since the very beginning, this merger was particularly successful in terms of strategic and financial outcomes. On the cultural integration side, some issues to be faced persisted after the merger deal. The article is structured in four sections. The first section captures some key theoretical framing elements. The second section describes the different collaborative management research cycles. Next, CMR as a blueprint for M&As, the quality

criteria for achieving rigor, reflection and relevance and the different levels of collaboration are explored. The final section highlights the contributions to theory, practice, and methodology.

## **THEORETICAL BACKGROUND**

### **Mergers and Acquisitions: theory and practice**

Mergers and acquisitions are viewed as a continuum of options that companies have in advancing a strategic intent (Mark & Mirvis, 2010). Wide variety of reasons have been articulated as the reasons for a merger, such as market dominance and economies of scale, risk spreading, cost cutting, synergies, survival, acquisition of cash, acquisition of talent, knowledge, and technology (Calipha et al., 2010; Carey, 2000). The number of M&As across industries has been increasing, yet the scholarly knowledge related to M&As is fragmented. This fragmentation is problematic, creating some barriers in studying M&As and raising questions about the relevance of academic knowledge production. In light of the M&As complexities and the fragmentation of scholarly knowledge, this article offers an OD-based, action-oriented collaborative approach that attempts to address the CEO's dilemma and advance scholarly knowledge.

### **Collaborative Management Research as an OD approach**

Action research orientation, since its origin, has been related to a variety of approaches and actions aimed at facilitating change (Coghlan & Shani, 2016). The basic underlying premise is that human systems could only be understood and changed if the members of the system are engaged and collaborate in the inquiry process itself (Lewin, 1946; Schein, 1980). Action research challenges the status quo from a participative perspective, aiming to contribute simultaneously to basic knowledge in social science and social action in everyday life (Coghlan, 2011). The central core of an action research orientation within the context of an organization is the *emergent collaborative inquiry process* that focuses on *real organizational problems* or

issues, rather than issues created particularly for the purposes of research. Action research's distinctive characteristic is that it addresses the twin tasks of bringing about *change in organizations* and in generating robust, actionable *knowledge*. As such it is an evolving process that is undertaken in a spirit of *collaboration and co-inquiry*, whereby research is constructed and conducted *with* members of a social system, rather than *on* or *for* them (Shani & Pasmore, 1985; Coghlan & Shani, 2014).

Collaborative management research, the action research modality used in this study, is defined as “an effort by two or more parties, at least one of whom is a member of an organization or system under study and at least one of whom is an external researcher, to work together in learning about how the behaviour of managers, management methods, or organizational arrangements affect outcomes in the system or systems under study, using methods that are scientifically based and intended to reduce the likelihood of drawing false conclusions from the data collected, with the intent of both proving performance of the system and adding to the broader body of knowledge in the field of management” (Pasmore et al., 2008: 20). A collaborative management research initiative progresses through cyclical-sequential phases. The actors involved (researchers and practitioners) engage in conversational processes of inquiry into experience so as to develop shared understanding leading to organizational action and the co-generation of actionable knowledge. As such they can be understood as engaging in ‘appreciative’ and ‘dialogic OD’, where the emphasis is on surfacing, legitimating, and learning from multiple perspectives and generating new images and narratives on which people can act (i.e. Bushe & Marshak, 2009, 2015). Through the conversations between the researchers and an organization's managers, they inquire together into the issues of concern, develop action plans to address the issues, and implement them. They then evaluate the outcomes of the actions, both intended and unintended; this evaluation may lead to further cycles of examining issues, planning action, taking action. Through the enactment of

collaborative cycles of planning, action and reflection, practical knowledge is cogenerated. Practitioners and scholars co-generating practical knowing is fundamental to overcoming the gap between rigor and relevance. Such process leads to a research that is insightful, influential and immediately applicable (Radaelli et al., 2014).

Action research and collaborative management research conducted in the OD tradition utilize a distinct quality criteria (Cirella et al. 2012; Coghlan & Shani, 2014). Building on Pasmore et al. (2008), Coghlan and Shani (2014) postulate that quality in the action and collaborative-oriented methodologies in OD is composed of six elements, each undertaken as rigorous, reflective and relevant. The six elements comprise: purpose and rationale, context, methodology and methods of inquiry, design of data collection and generation methods, the narrative of events, reflection on and analysis of the narrative in the light of the experience, and theory and an extrapolation to a broader context and articulation of the contribution to both theory and practice. In this article, we will assess the quality of the CMR work in the M&A case in terms of these six elements as undertaken as being rigorous, reflective and relevant.

### **The role of learning mechanisms in OD interventions**

The learning capacity of a system is an integral part of any change process (Pasmore, 2011). As such, learning mechanisms are a key practice in building and sustaining system-wide transformational processes (Mitki et al., 2008). Popper and Lipshitz (1998, 2000) view learning mechanisms (LMs) as institutionalized structural and procedural arrangements that allow organizations to systematically collect, analyses, store, retrieve and use information that is relevant to the performance of the organization and its members. Shani and Docherty (2003) classify LMs into three broad categories, namely cognitive, structural and procedural learning mechanisms. Cognitive learning mechanisms support learning providing the language, concepts, theories, frameworks and values for thinking, reasoning and understanding (e.g. declarations of values, institutionalization of a common language). Procedural learning mechanisms include

the rules, routines, methods and tools that can be institutionalized within the organization to promote and support learning (Pavlovsky et al, 2001) (e.g. tests and assessment tools and methods, standard operating procedures, and methods for specific types of collective learning, such as action learning or de-briefing routines). Structural learning mechanisms concern the organizational, physical, technical and work system infrastructures that encourage practice-based learning (e.g. communication channels, lateral structures to enable learning of new practice across organizational units, delineation of roles and establishment of teams with shared accountability, networks for mutual learning).

## **THE CASE**

ReBUILD was the result of the merger between two companies in the Italian real estate funds industry. The decision to merge was strategically driven so as to exploit the synergies between the two companies by creating a third bigger company, with increased assets under management. Such an effort if successful resulted in establishing an uncontested leading position in the domestic market.

ReBUILD's top management team was leading the merger process and finding the integration of the former separate companies difficult. The vignette at the top of this article captures the questions that the CEO was asking and it was from this conversation that he decided to engage the company in a collaborative management research project to both advance the merger and to better understand the merger dynamics.

### **The context**

ReBUILD, as the two merged companies, operates in the Italian real estate funds industry. The complexity of this industry derives mainly from two main characteristics. On the one hand, it is regulated and supervised by financial authorities such as the FED or the SEC in the US, or the Bank of Italy and the Consob in Italy as it involved financial activities that include institutional investors and pension funds. On the other hand, it is a business about real estate



management. Fund managers not only have to buy and sell properties, but also sometimes are involved in developments, property refurbishing or enhancements. While the real estate funds are quite an established asset class for institutional investors in the US and many European countries, they are a relatively young investment instrument in Italy, where they were introduced only in the late 80's.

*The two merged companies: ESTATE BUILDINGS and REAL FUNDS*

ESTATE BUILDINGS was a young company, founded in 2005 in Milan. Small in size and with mainly private investors, this company was very dynamic and used a quite informal and not very proceduralized way of doing things. REAL FUNDS was an older company, slightly bigger than ESTATE BUILDINGS, founded in Rome in 1998 by a joint initiative of a major Italian pension fund and a banking house. Thus, it was a hybrid company: on one hand it was a state-owned company, but on the other it adopted a banking approach. A very specific bureaucracy characterized the nature of work in this company. Beyond the distinct differences, ESTATE BUILDINGS and REAL FUNDS had also few commonalities such as, being relatively small companies, with strong ties to their CEO/entrepreneurs and general non-standardized approach in which everyone made a bit of everything.

*The challenges to be addressed*

The first phase of the merger highlighted many challenges. The newly appointed CEO of REBUILD came from a different industry and was not familiar with the real estate funds industry. The transition from two small enterprises to one medium-sized company located in two regions and cities (Milan and Rome) resulted in the establishment of new procedures, standardized processes, new norms, and organizational structure. People from both companies

were worried about changes and the direct implications for their work practices. There was a good deal of uncertainty and fear. Last, the top managements of the two companies had not involved their staff in the discussion about the reasons for the merger, the merger process, nor had they defined clearly the objectives.

The integration of the two organizations was slow as many of the systems that were in place did not align in a natural way and required redesign. Doubling the size of the company with a higher set of standards required the development of new business routines. Adding layers of management meant further detachments from the decision-making centers. The past family-based cultures were being replaced with professional management practices. The physical distance between the top levels and the lower levels of the company, due to the two locations of the new company presented a major challenge in the integration process. A sort of rivalry between the two locations still existed and at times members of the two old companies saw each other as competing.

*The research project: two-and-a-half cycles of CMR*

The collaborative management research project lasted 13 months, taking place from January 2013 to February 2014. During the project, the CMR cycle was repeated two and a half times. The first cycle was aimed to gain insight into the company and its post-merger dynamics. This first cycle resulted in the identification of the organizational culture and its complexity as the most critical area that needed an in-depth study. The second cycle focused on mapping the ‘current’ and preferred organizational culture. The last half-cycle concerned the identification of specific interventions to address the issues that were surfaced during the second cycle.

The engine that housed and nurtured the research collaboration during the two and a half cycles was the collaborative management research team, a hybrid learning mechanism incorporating internal and external knowledge bases. Not only did the CMR team represent a

microcosm of the organization, but it also included external researchers from varied disciplinary background. The team included a member of the top management team who was responsible for reporting to the CEO. Throughout the research process, the team jointly designed and implemented the different phases, protocols and tools and engaged in collaborative sense-making and sense-giving activities.

*The 1st CMR cycle: collaborative investigation of the company*

The first phase involved the CEO of the company and the CMR team. The complete cycle lasted five months. Table 1 summarize the phases, timeline purpose, actors involved and activities of this first cycle.

*Table 1 - 1st CMR cycle: collaborative investigating of the company*

	PHASE	TIMELINE	PURPOSE	ACTORS	ACTIVITIES
<b>Collaborative research process design</b>	Initial CMR activities	1 week January 2013	Establish basic commitment for a collaborative project; Mutual education about the company	Researcher, CEO, HR director	- Preliminary dialogue with Top management about common areas of interests; - Criteria for CMR team selection & creating the CMR team
	Establishing the CMR mechanism & setting direction	2 weeks January 2013	Establish the CMR team, developing an understanding of the CMR purpose, process, mechanism, redefining the scope of the project	CMR team, CEO  [CMR team composition: - 5 researchers - 4 people of the company (HR director, one manager, two employees)]	- The CEO in collaboration with the HR Director formed the CMR team and called for the first joint meeting - Mutual education about the company & CMR - Decisions about the relevant topics to be explored: Mapping out the key issues following the company merger - Exploration of alternative research design and research methods. - Initial decision about time line of the study and agreement about the data collection process
	Developing the CMR design, methods & process	1 month February 2013	Refining the research design, methods, data collection process and protocol	CMR team	- Development of data collection tools (Interview protocols) - Setting of data collection timeline and procedure - Notification to organizational members about the study and its purpose by an email from the CEO - Notification to the randomly selected employees and managers about the interviews - Setting of time for the interviews
<b>Understand the phenomenon under inquiry</b>	Qualitative data collection	2 months March and April 2013	Data collection	- CMR team and organizational members (20 members of the management team and 30 employees)	- 20 interviews with the management team (half in Rome, half in Milan) - Interviews with 30 employees (half in Rome, half in Milan) - Initial content analysis of the data by CMR team
	Shared qualitative data interpretation	3 weeks May 2013 - June 2013	Facilitation of the creation of shared meaning	CMR team	- Data analysis and interpretation by CMR team - Creating shared meaning of data
<b>Implementation/ Outcome</b>	Identification of the need to develop a shared understanding of the company	2 weeks June 2013	Identification of the specific themes to be investigated	CMR team, CEO	- On the basis of the insights from qualitative data collection phase, the CMR team and the CEO agreed on running a survey to map the organizational current and preferred culture

*Collaborative research process design.* The project started at the beginning of January 2013 with preliminary dialogue between the CEO and the senior researcher about common areas of interests. The initial conversations led to an agreement to collaborate on identifying the major challenges that resulted from the merger and possible action steps to help the company meet its new vision. Some initial agreements on the research mechanisms and its scope first were made, and the criteria for CMR team selection and creation were established. The HR director was appointed by the CEO to be the project leader. The following two weeks were dedicated to the establishment of CMR team, to the understanding of the CMR purpose, process, mechanism, redefining the scope of the project.

The CEO, in collaboration with the HR director, formed the CMR team and called for the first joint meeting. The first CMR team meeting was introduced and led by the CEO, explaining the purpose of the study, its collaborative nature and his expectations about the outcome of the project. The CEO stressed the point that this would be a collaborative project that would provide input for actions. He said

“..This is not a consultancy project. This is a research project. Now you are part of a research team, and you will have to look at our company and better understand it, so that we can understand what we can do to improve and to make this merger real...”

At this first meeting, following some information exchanges about the company and the CMR process an initial review of some of the relevant topics to be explored took place. The process content goal was to identify and map out the key post-merger issues. Alternative research designs and data collection methods were explored, and agreeing on a qualitative data collection process was reached. The HR director seemed to be skeptical about the project and the collaborative approach, and raised possible issues of trust and commitment from the employees and management during the research/learning process. Once the methods and the process had been established, organizational members were notified about the study and its

purpose by an email from the CEO. Randomly selected employees and managers were notified about the interviews and times for the interviews were set.

To develop the interview protocol, the CRM team discussed possible research questions. Following discussions, it was agreed to investigate the relationship between cultural identity and performance at individual, unit and firm levels; the impact of the merger strategy on organizational design, structural and process configurations and management control systems, and; the role of the technical and human resources management systems in cultural integration.

*Understanding the phenomenon under inquiry.* After agreeing on the mechanisms and the process, eight weeks were dedicated to the qualitative data collection. Interviews were conducted by researchers only, with twenty individuals who had managerial responsibility and thirty employees, almost equally split between Rome and Milan. The interviews were conducted simultaneously and in parallel sessions in the two sites. During the interviews, people were asked questions following the agreed interview protocol developed by the CMR team. The first section of questions was related to the perceived corporate strategy, the company performance and the possible threats in the market. The second section was dedicated to the overall merger experience. The third section of questions was related to the organizational culture issue. The last section of the semi-structured interview guide addressed the organizational structure, the HR system, the key processes, procedures, people and roles, and the role of technology. A general enthusiasm about the project started to spread within the company. People interviewed felt free to talk about the problems they saw in the companies (different sub-cultures, lack of communication between the top management and the employees, daily workload, redundancy between some of the units' tasks).

All the interviews were recorded and transcribed by the researchers, collecting over 500 transcribed pages of 3700 minutes of primary source material. The researchers adopted the traditional coding process, analyzed the transcriptions through a series of meetings, re-readings,

and recordings. After the coding was completed, a document that was organized by content clusters with raw data (verbatim statements taken from the interview were included under specific subheading) was presented to the CMR team. Some exemplary quotations of this document were:

“..We suffered from the fact that we had to change our working routines, without being informed on the reasons and the goals of such changes..” – interviewee (employee)

If you don't explain people to whom they should report and how to climb the slope, especially if they are young, you will demotivate them. Look at the many levels the new hierarchical chain has above me!..” - interviewee (employee)

“..An integration between the areas is needed. There are small areas or islands or empires, with their little emperor, lords, marquises, dukes and barons, under which there are tectonic plates..” - interviewee (employee)

The CMR team produced a final document with rich and sensitive data that was cluster-based on content analysis coupled with the initial interpretation and agreed to present and discuss the findings with the CEO in a dedicated joint meeting.

At this point, the HR director insisted on meeting the CEO alone to review the CMR process to date, the raw data and the initial interpretation. Not following the agreement made within the CRM team, he dropped the findings document on the CEO's desk and asked him to read it. The HR director was still not engaged in the CMR process, but more concerned about reporting some results to the CEO, as he would have done with the results of a consultancy project. That night the second author received a call from the CEO asking for an urgent meeting. The purpose of such a meeting between the CEO and the senior researcher was to review carefully the process to date and the initial study outcomes. The HR director joined the meeting during the last part, and a shared decision was made about the next phase of the study. Only during this meeting, and only by experiencing the deep preoccupation of the CEO with the data and its possible meaning, the HR director realized the impact that CMR project was having in

the organization: people were speaking up about the emerging company situation following the merger, and not all was positive. Top management operations were being questioned, sometimes in a harsh way, and cultural misalignments were more than evident. As a conclusion of the meeting, it was agreed that the CMR team would continue with the collective sense making process to identify the focus for the next phase of the collaboration.

*Implementation/Outcome.* The CRM team devoted two meetings to data sense-making. One senior manager commented

“..We are losing commitment of the operative levels...they are feeling “at the edge of the empire”...this is a huge change for them because they used to be much closer to the decision makers... This is very dangerous! Success of ReBUILD in the long term is based on its human capital, if we lose it we could potentially be in big troubles..”

During these two meetings answers to the research questions were formulated as a result of the collaborative sense making. The perceived organizational culture identity seemed to not be related to unit performance, but rather to individual job satisfaction and affective commitment. Clarity of organizational cultural identity was not perceived as impacting the firm performance in the short term, due to the natural supremacy of ReBUILD in the market, but it was perceived as impacting the firm performance in the long term due to the perceived coming changes in the market. The strategic approach to managing integration of the different cultures was not affecting the management control systems; instead, it was affecting the processes, since some key business processes seemed to be implemented in different ways in the different locations. The technical system was affecting the cultural integration in a mixed way: on one hand, the effect was positive due to the facilitation of communication between Rome and Milan (through video calls and instant messaging platform); on the other hand, the effect was negative due to the technicalities of the shared reporting system, since this particular aspect was perceived as bringing in unnecessary work overload regarding standards for document generation. The human resource management system for managing cultural integration was



affecting the cultural integration in mixed way: attention to training was perceived as having a positive impact, while neglecting opportunity-enhancing practices, devoted to involve employees was perceived as a very negative for cultural integration. Organizational design configuration was perceived as redundant and duplicated in most parts and so was negatively affecting the organizational culture, impacting negatively on efficiency and effectiveness of internal performance. The technological system complexity was perceived as not having impact on culture and firm performance.

The CEO joined the second half of the second meeting. The meeting focused on three issues: (i) What are some of the common challenges that are identified that require immediate management attention? (ii) What should be the next phase of the study and its focus? and (iii) What process should be followed in the next phase of the study? A few ideas for immediate actions were identified. The feeling that top management did not spend much time in Rome, being mainly based in Milan, was identified as a major issue. The CEO agreed to explore the issue with his management team and take action accordingly. Developing an integrated HR function for both sites and staffing both sites with trained HR staff was identified as an area that could help in the integration of the company. The HR director was instructed to investigate the issue and take appropriate actions. Some confusion seems to have existed between organizational members of the two sites as some key business processes seemed to have been implemented in different ways. The CEO committed to take this issue to his top management team for review and immediate action. The HR director was directed to report the actions that were implemented to the research team within two weeks.

The sense making process also led to the realization that many subcultures seem to have evolved over time, much more than the top management suspected. This was an important discovery for the top management, and it was possible due to the fact that for the first time after the merger people have been asked to express truly their voices, and the company through the

CMR team engaged in a shared process of sense making of these voices. The notion that this fact – of many subcultures - seemed to get in the way of taking advantage of the merger and have a negative impact on both individual and unit performance was identified as a critical issue for further investigation.

It was agreed to continue to use the CMR approach and for the CMR team to explore few possible approaches and choose the most appropriate one to guide the investigation and the investigation methods. The CMR team and the CEO agreed on starting a second cycle, with the main aim to run a comprehensive survey for further investigate some critical areas, mapping the current and preferred organizational culture.

*The 2nd CMR cycle: development of shared understanding of company culture*

The second CMR cycle lasted 13 weeks, from June 2013 to December 2013. This second cycle aimed to collect and analyze further data so as to develop a shared understanding of the current and the preferred company culture. Table 2 summarizes the phases, timeline purpose, actors involved and activities of this second cycle.

*Table 2 - 2nd CMR cycle: development of a shared understanding of the company*

	PHASE	TIMELINE	PURPOSE	ACTORS	ACTIVITIES
<b>Collaborative research process design</b>	Initial activities	1 week  June 2013	Launch the second phase of the project	CMR team	- Framing of the areas to be further analysed (on the basis of the insights from qualitative data collection phase): - Mutual education about possible alternative theoretical models of organization culture that can guide the study - Creation of a survey adapted from Cameron and Quinn's Competing Values Framework - Creation of a web – based survey platform
	Design of quantitative data collection	2 weeks  June 2013	Developing of the survey instrument	CMR team	- Decision to run two sub-sequential rounds of the survey: 1. about the “current”, organizational culture fulfilled by all the organizational members 2. about the “preferred” organizational culture, fulfilled by the Top Management only - Development of the survey items and the two survey processes (launch dates, programs for the reminders, closing dates)
<b>Understanding of the phenomenon under inquiry</b>	1 <sup>st</sup> quantitative data collection (mapping of current culture)	1 month  July 2013- August 2013	Data collection	CMR team, organizational members	- Communication to all the organizational members that review the study's progress to date - Web-survey delivery to all the organizational members about the “current” organizational culture of the company
	Shared quantitative data interpretation	Two weeks  September 2013	Facilitation of the creation of a shared meaning of the first round of the survey	CMR team	- Data analysis and interpretation by CMR team - Creating shared meaning of data - Setting of the second-round of the quantitative data collection
	2 <sup>nd</sup> quantitative data collection (mapping of the preferred culture)	Two weeks  September 2013 – October 2013	Data collection	CMR team, Top Management	- Web-survey delivery only to Top Management to identify which should be the preferred organizational culture of the company

	Creating an organizational shared meaning of data and charting a course of action	Half-day  November 2013	Creating organizational wide shared meaning and generating ideas for change and improvement	CMR team, Top management	- Meeting with the Top management, aimed to: <ul style="list-style-type: none"> <li>• Creation of an organizational shared meaning about the desired organizational culture</li> <li>• Creation of shared meaning of the organizational view of the present culture</li> <li>• Examinations of the gaps between the “actual” and “ideal” state</li> <li>• Generating ideas/suggestions for action to close the gap</li> <li>• Achieving Top management commitment to actions and timeline for action</li> </ul>
<b>Implementation/ Outcome</b>	Projects to be undertaken	1 month  November - December 2013	Identification of four projects to be undertaken on the basis of what arisen during the top management meeting	CMR team	- Framing of four projects concerning: <ol style="list-style-type: none"> <li>1. Leadership development project</li> <li>2. “Streamlining of procedures” project</li> <li>3. “Improving communication” project</li> <li>4. “Best practices” project</li> </ol> - Assignment of a project champion to every project

*Collaborative research process design.* The second cycle started with the collaborative framing within the CMR team of the areas that needed further study. On the basis of the insights from qualitative data collection phase, the areas that were taken into consideration were the organizational (sub)culture(s), the leadership styles of the management, the HR system strengths and weaknesses, and efficiency and effectiveness of procedures.

The researchers identified and proposed alternative theoretical models of organization culture that could guide the study. In this phase, the understanding of the theoretical models by the HR director and the employees in the CMR team was critical. A joint decision was made to build the overall conceptual guiding research framework on the Competing Values Framework by Cameron and Quinn (2006). It was fundamental to take the time to explain to the whole CMR team what the model consisted in and how it works.

Some examples of the research questions to investigate proposed by the researchers were: the continued existence of subcultures, what these subcultures are, the framing of a preferred shared organizational culture, what actions and learning mechanisms would lead such a shared organizational culture and the role of leadership and the human resource system in fostering the creation of a shared organizational culture.

The design of the quantitative data collection was carried out within a highly collaborative environment within the CMR team during the second half of June 2013. The survey items were created, adapting the scales from Cameron and Quinn and adding measurement scales that addressed the issues of leadership styles in the company, HR system strengths and weaknesses, efficiency and effectiveness of procedures. The CMR team developed the survey items, translating together the original questionnaire of the Cameron and Quinn's model to Italian, from Italian to English and back to Italian, to ensure validity as well as the adoption of the proper company language. A senior manager commented

“..To us [on the CMR team] it is clear what “Clan” means in the theoretical model, it is about the value of collaborating with others in the organization. But for people of this

company, due to our past, if you say “Clan” everybody for sure will unconsciously associate a negative meaning, something like mafia clans, little closed groups that are rivals. We have to emphasize the collaborative essence...”

The HR director noted

“..We should always refer to “our company” in the questions. Not “What do you think about this aspect of *the* company”, nor “what do you think about this aspect of *your* company”, but always “What do you think about this aspect of *our* company”. I think it’s very important..”

A web-based survey platform was created such that the company as a whole could take part in the study. Technical aspects of the web-survey had to be explained in-depth, to ensure both anonymity of the answers and full commitment of the whole organization. Based on a top management decision, it was decided to run two sub-sequential rounds of the survey: (i) the focus on the current organizational culture would be completed by all the organizational members; (ii) the focus on the preferred organizational culture would be fulfilled by the top management only. The CMR team planned the two processes in details, defining launch dates, programs for the reminders and closing dates.

*Understanding of the phenomenon under inquiry.* Once the design part ended, the quantitative data collection was begun. A first survey, delivered to all the organizational members that aimed to map the current organizational culture was electronically distributed from mid-July 2013 to mid-August 2013. An email from the CMR team and the top management was distributed to all the organizational members asking members to complete the survey while reiterating the rationale for the study. The commitment of the whole organizations was very high: the survey achieved a 89% response rate already in the first two weeks.

After the summer vacations, the CMR team met to review the results of the survey elaborated during the last week of August 2013 by the researchers, and to facilitate the creation of a shared meaning of this first round of the survey. Data confirmed that different specific

subcultures seemed to co-exist in the company: Milan vs Rome, pre-merger vs post-merger, new employees and veteran employees; different units' subcultures, and management vs employees. A senior manager commented

“..If you have a look at the cultural profiles Rome vs Milan, you can see how much in Rome they are stick to Hierarchy dimension...It's probably because they still perceive they are far from top management in Milan. In Milan the Clan dimension is stronger, for sure, this is due to the newcomers' perception, most of them are in Milan..”

The results of this phase were shared only within the CMR team. The second round of the data collection was then set. As previously said, the CMR team was now working in an extremely effective and collaborative way, and every member was fully aware about the importance of confidentiality and trust within the team. The senior manager in the CMR explained

“..I would like to explain personally the theoretical model to the top management during the meeting, I think now I know how to translate the “scholar” language into our company language..”

The second round of the survey was delivered to the top management between the end of October and the beginning of November, to identify the preferred organizational culture, and data were analyzed by the CMR team.

After the completion of the whole quantitative data collection process, a date for a management retreat was established. This was the moment in which the collaborative nature of the research process reached to involve a crucial part of the organization – the top management – not only during the data collection but also for the sense making of data. The aim of the retreat with the top management was to create a shared meaning of the data and generating ideas for change and improvement. The meeting was structured as a half-day retreat. Researchers and half of the top management team were in Milan, while the other half of the top managers and the CEO were in Rome, participating via video conference. The researchers, presenting the

results, initially led the meeting. The discussion was then facilitated by the HR director and a top manager who was a member of the CMR team. In particular, the meeting was aimed of creating an organizational shared meaning about the preferred organizational culture for ReBUILD.

Following the development of a shared view of the preferred culture, the discussion moved to the current culture profile. An attempt at developing a shared view of the current culture led to the realization of some significant gaps between the preferred and current culture.

“..We definitely don’t have the pulse of our current cultural profiles...it’s very different from the ideal we imagine. We are wearing rose-coloured glasses..” – Top manager

“..We have to decrease hierarchy perception...look at the data, middle manager have the same cultural profile of mining industry...we have to reduce the operational work, probably sometimes we are not aware of the impact that one request from us is having in terms of workloads on the people below in the chain..” – Top manager

“..So the point is now: which kind of actions do you think should be implemented to, namely: increase collaboration and creativity, and decreasing hierarchy and competition inside the company?..” – Researcher

The discussion, led by the CEO, moved to the identification and initial exploration of ideas for action to close the gaps. Some charts were produced to summarize the main statements arisen during the discussion. These statements were the bases for defining the outcomes to be implemented, in terms of projects to be started to address the gaps between the ideal and current cultures. The meeting generated commitment for action by the top management team with the establishment of a timeline for execution.

*Implementation/Outcome.* During the following month, the CMR team suggested specific interventions on the basis of what arisen during the top management meeting. Four specific projects were identified: (i) a leadership development project for middle managers, (ii) a project aimed to streamlining and unification of procedures and processes, (iii) a project aimed



to the improvement of the internal company communication, and (iv) a project aimed to identify best practices in work to reduce the operational non-adding value activities. A project champion, chosen by the CEO and the HR director, was assigned to each project. The HR director asked for some specific insights about alternative strategies for the implementation of the different projects and possible CMR mechanisms that could support the projects. He was now fully engaged in the CMR process, having experiencing the added value of the CMR for ReBUILD. This emerging need for support and the desire to launch multiple projects led to the decision to start a third CMR cycle.

The sense-making process led to answers to the research questions formulated at the beginning of the second CMR cycle. First, the existence of different subcultures seemed due to the fact that the activities taken by top management were not comprehensive and seems to have neglected the complexity of the context. Second, the preferred organizational culture for ReBUILD was described as more collaborative and creativity oriented than hierarchical and competition oriented. Third, specific learning mechanisms were identified to address the cultural gaps, such as procedural improvements and enhancing of transparency values within the company. Fourth, periodical top-down and bottom-up communication about the strategic objectives of the company were identified to be crucial to foster communication in both ways. Fifth, transformational leadership capabilities related to envisioning the future, motivation of organizational members, challenging the routines, providing a clear direction and fostering autonomy were identified as impacting the creation of a shared culture. Finally, HR opportunity-enhancing practices and training practices were identified as crucial for the creation of a shared company culture for different reasons: the formers were related to make the company members feel more part of the “big picture”, the latter were related more to their team building activities.

*The beginning of the 3<sup>rd</sup> CMR cycle: Start of the work of the four champions and initial exploration of possible CMR mechanisms*

In December 2013, the HR director started the third cycle of the CMR collaboration, supported by the CEO, who was approaching the end of his three-year appointment with the company.

*Collaborative research process design.* From December 2013 through January 2014 the work started and the CMR team identified the CMR mechanisms that could nurture the four projects launched at the end of the second cycle. Initial framing of these possible mechanisms and of the timeline was carried out. At this point, the HR director and the other two people from the company in the CMR team were fully aware of the importance of CMR mechanisms to foster the effectiveness and the success of organizational change. This led to the design of a new data collection phase, structured in two rounds. A first round of interviews with the project champions, to understand the status of the projects and the issues to be dealt with was expected to be performed in the spring 2014. A second round of interviews and quantitative data collection to map the organizational culture and how it had been affected by the project was expected to be in the autumn and winter 2015/2016. Since the CEO's appointment was due to finish in March 2014, a new CEO joined the company. While the HR director was strongly supportive of the project and the need to complete the third phase of research, the new CEO did not have any familiarity with the CMR approach, let alone action research as a management tool. He decided to put the project on hold.

*Overall outcomes of the CMR cycles*

The transition to a new CEO, as was mentioned, resulted in the freezing of the CMR effort. Many added value outcomes of the CMR project can be identified. First, structure and process improvements were implemented during the project, many of which were linked directly to discoveries and new insights from the sense making process. Second, different and long-term

interventions were implemented in the company on the basis of the results of the first two CMR cycles, namely: the framing of four projects concerning leadership development, streamlining of procedures, improving communication, identification of best practices; the assignment of a project champion to every project; the design of dialogue-based learning mechanisms to sustain the project, such as periodical meetings, data collection within the companies members and shared sense-making of the process. Third, the effects of the CMR process could be seen in the commitment to the change process and engagement of a wide range of organizational members in an ongoing open reflection about the status of the company. For example, the evolution of the HR director from sceptical actor to enthusiast promoter and advocate for continuing a further CMR cycle in front of the new CEO. Fourth, the jointly conceived research questions produced answers that were relevant for both theory and practice, as illustrated in the outcomes section of the first two CMR cycles.

## **Discussion**

The discussion focuses on three main issues. First, it highlights how the CMR approach can be used as a process that can address the many challenges during a merger while designing and managing learning mechanisms. Second, it discusses the rigor-reflection-relevance dimensions. Third, it reflects on the key characteristics of collaboration with a specific focus on the case.

### **CMR as a blueprint for M&As: The importance of learning mechanisms**

While the collaborative management research was put on hold by the new CEO, the progress in the merger venture was enhanced by the collaborative management research approach. The CMR process and mechanisms acted as method for the merger facilitation and addressed the dilemma faced by the organization during the first three years following the merger. At the core of the CMR effort was the establishment and facilitation of a continuous learning process that was enabled by the design and management of learning mechanisms.

Learning mechanisms were fundamental for the work of the CMR team. Concerning the *cognitive learning mechanisms*, the preliminary phases of the first two cycles involved several dedicated moments for developing a shared language and vision both of the project itself and of the different scopes of the specific phases. When approaching the specific tools and guiding theories to be used for data collection and interpretation, the development of a shared understanding of the theoretical frameworks was another crucial learning mechanism for the process. This was particularly true for the transition between the end of the first cycle and the beginning of the second cycle, a delicate moment of the collaboration in which a shared vision and an accepted methodology were urgently needed. As for the *procedural learning mechanisms*, the team developed several debriefing procedures after the completion of the different sub-phases, especially after data-collection activities, and specific protocols for team conversation about results and next steps. *Structural learning mechanisms* were also important, as some figures for communication exchanges between organizational members and researchers were identified from the beginning.

The learning mechanisms evolved and were designed throughout the duration of the project. *Cognitive learning mechanisms* involved planned communication to the whole organization about the scope, the activities, and the progress of the project, to help organizational members to develop a shared vision of the collaborative effort, as well as its importance. As can be seen in the case, the four projects identified at the end of the second cycle were all examples of *structural* (namely the improvement of organizational communication flow and the implementation of a best practice database) and *procedural learning mechanisms* (namely the streamlining of the procedures). The continuous development of a variety of learning mechanisms illustrates that the CMR team successfully succeed in extending learning mechanisms from the team to the whole organization. For this to happen,

perceived added value by the CMR team, organizational members and management had to be demonstrated (Fredberg et al., 2011; Cirella et al, 2015).

### **The importance of balancing rigor, reflectiveness and relevance**

Examining the quality criteria that guided the CMR process highlights the ongoing attempt to achieve a balance between scholarly rigor, reflectiveness, and relevance. Designing for and sustaining the effort's quality was guided by the quality criteria framed by Coghlan and Shani (2014). Table 3 below captures the essence of the intervention quality while utilizing Coghlan's and Shani's quality elements dimensions.

As introduced earlier, Coghlan and Shani (2014) postulate that quality in the action and collaborative-oriented methodologies in ODC is framed by six elements each undertaken as rigorous, reflective and relevant. Table 3 captures the specific actions taken in relations to each of the six elements in the ReBUILD case and the actionable knowledge that was generated. The sensitivity to meet both organizational needs and scholarly rigor of the discovery process was an integral part of the collaborative research design process throughout the study was one of the study's foundation. During the first research cycle, the generation of interview questions that could capture the wide and vast business areas by the CMR team while at the same time including questions that were guided by research questions were driven from the identification of knowledge in the scholarly literature.

Table 3 - Elements of quality in CMR (adapted from Coghlan and Shani, (2014))

	The essence	Rigorous	Reflective	Relevant
<b>Purpose and rationale for action and inquiry</b>	<ul style="list-style-type: none"> <li>• Case for why action and research are necessary or desirable?</li> <li>• What contribution is intended</li> </ul>	The rationale for the CMR came from the merger of the two companies and the desire to bring the resources of CMR to bear on its implementation.	M&As as a field of study are targeted by many different disciplines (e.g. finance, strategy), but mostly with a prescriptive aim and contradicting findings. A CMR approach had the potential to bring to new useful insights about how a company can make a M&A process work	Bringing CMR to M&A in a case of a real merger was relevant for the company involved, addressing a real “in present tense” organizational problem
<b>Context</b>	Understanding the business, organizational and academic context	The context of the merger is Italian real estate sector. The organizational context is a M&A process. The CMR data collection aimed to frame and take into consideration the specificities of such a complex context in a holistic way	Starting from the current “problematic” situation of the company, the CMR aimed to gain deeper insights about the real organizational problems and about the contradictions that can be found in M&As literature	The CMR approach took into consideration several different aspects to frame systematically the complexity of the context
<b>Methodology and method of inquiry</b>	<ul style="list-style-type: none"> <li>• The role of the collaborative management researchers</li> <li>• Ethical issues</li> <li>• Contracting</li> <li>• Establish learning mechanisms</li> </ul>	During the whole CMR process, the contracting, the methods and the tools were extremely collaborative and came from a joint effort	The 2 and a half CMR cycles are framed and described in details in the narrative of the story Learning mechanisms to foster the work of the CMR team were adopted (shared vision and common language, accepted theories, framework and tools, formal roles within the team)	The CMR process described shows a joint effort in adopting methods and protocols that both met organizational criteria (e.g. caring about organizational common language) and academic criteria (adopting scales and measurement from literature)
<b>Design</b>	<ul style="list-style-type: none"> <li>• Data collection and generation</li> <li>• Cycles of action research</li> <li>• Building relationships</li> </ul>	Data collection and analysis have been performed collaboratively during the whole 2 and a half cycles always following rigorous criteria both for the choice of the data collection protocols and for the data analysis and interpretation, with coding and shared sense making.	The aim of the CMR process has been to collaboratively design all the different steps from the very start. At the beginning, this seems to be not an easy task, due to the unfamiliarity with CMR approach of some organizational members. Researchers’ effort was aimed to manage issues of trust during the whole process, improving significantly the quality of the relationship within the CMR team and with the organization from one cycle to the other, as it is clearly shown at the end of the collaboration.	As for the methods, also the design of the CMR data collection and analysis were aimed to both meeting organizational criteria (e. g. defining the timeline for interviews and survey administration to fit the organizational routine) and academic criteria (defining appropriate cycles and re-iteration for data collection and analysis)

<b>Narrative and outcomes</b>	Describe the story and outcomes (intended and unintended)	The story is told with an appropriate level of details, distinguishing facts and values.	The story demonstrate collaboratively inquiry in the present tense	The story of the CMR process aims to capture the what actually happened, both in terms of expected outcomes and in terms of unintended outcomes, such as the internal dynamics within the CMR team
<b>Reflection on the narrative in the light of the experience and the theory</b>	<ul style="list-style-type: none"> <li>• Analyze story and reflection</li> <li>• Make judgments on the process and outcomes</li> </ul>	The narrative description of the outcomes aims to show rigor in design of the process, data collection and data interpretation.	During the whole process a CMR approach was adopted to collaboratively reflect on the collect data and results, in order to create a shared interpretation of meaning. The CMR approach was adopted within the CMR team and with organizational members, involving both employees and especially the top management community. The final workshop of the second cycle was aimed to stimulate the dialogue about organizational meaning of the findings and actions to be undertaken	The outcomes of the CMR process were ultimately focused on: <ul style="list-style-type: none"> <li>- identifying specific organizational interventions to be undertaken</li> <li>- produce valuable and publishable academic knowledge</li> </ul>
<b>Extrapolation to a broader context and articulation of practical knowing</b>	<ul style="list-style-type: none"> <li>• Link story to theory (existing and emerging theory)</li> <li>• Discuss the story and outcomes</li> <li>• Discuss the action research process, quality of relationships, and sustainability of the outcomes</li> <li>• Articulate contribution to both theory and practice</li> </ul>	The entire account of the CMR process contribute to the practical knowing bringing insights about a real organizational issue in the present tense, showing how to help an organization understanding the dynamics in place in a M&A context, in a complex industry	The overall account shows to meet AR quality. The attention to the quality of the relationship and its improvement during the CMR process has been clearly described	The ROI of the CMR project has been positive both for the organization and for the researchers. For the organization, because it was able to gain new insights about organizational dynamics put in place after the merger, and to identify specific organizational interventions to be undertaken. For the researchers, for recording a CMR collaboration that could aim to be a subject for academic publications

The sensitivity to organizational routines and common language and at the same time adhering to the scholarly research criteria was achieved by adopting methods and scales from literature, designing re-iterative cycles of data collection and analysis, and framing the context and the specificities of the case. The collaborative sense-making process was guided by initial data analysis by the researchers (adhering to the scholarly methods and tools) provided the data for collective and share sense making by the CRM team as well as shared sense-making process with both organizational members and management via focused meetings and workshops. The richness of the sense-making process outcomes triggered ongoing managerial actions while simultaneously led to the development of papers for research publications. Thus, CMR and action research, in general, can play an important role in the success of M&As through processes of shared meaning making and learning that stretch way beyond the initial acquisition phase.

### **The nature of collaboration when dealing with M&As**

Collaboration in systems are complex and as such need to be designed and managed. Collaborative management research is about collaboration at different levels with varied degrees of intensity. Some view collaboration as the challenge for the next decades that must be managed (Huxham & Vangen, 2000). Collaboration relates to a variety of intentional human efforts within and across levels and disciplines (Eigenbrode et al., 2007). The ‘how’ of integrating different actors with a different background is under-debated in the literature (Eigenbrode et al., 2007).

The CMR process of ReBUILD, indeed, involved facilitating the collaboration within different levels, different actors and different disciplines that were crucial for supporting the merger process. The evolution of the collaboration in the ReBUILD case can be framed with the theoretical model proposed by Mohrman and Shani (2008: 531), who claim that “the starting point of the project is often one where the gap in the mutual understanding and commitment to partnership between the academics and the



practitioners is wide, and as time goes on the gap seems to decrease” . Research collaborations start by aligning purpose, building on the institutional contexts and the resources they provide, and continuing with the adoption or design of learning mechanisms. Shared language evolves as the parties work through both the discovery and sense-making processes.

In the ReBUILD case, collaboration within the CMR team was critical. Achieving a collaborative environment within the CMR team was complex. In the first phases of the project, issues of trust and legitimization hindered the effective collaboration especially concerning the HR Director, who seemed both skeptical and not fully engaged. The collaboration was stuck in the phase of different levels of understanding and commitment to collaborative relationship. This underlying challenge almost led to the abrupt ending of the project. The crisis had been overcome through an open dialogue within the CMR team and the realization of the sensitive nature of the data and of the new insights generated and the need to continuously review the discovery process that resulted in the data generated. This dialogue enabled the collaboration to move forward in the collaboration process, aligning purposes, adopting learning mechanisms and developing a shared language (Mohrman & Shani, 2008). All the members were more engaged in the collaboration. In the end, the HR director was the first supporter and advocate of the continuation of the CMR process, perfectly aware of the added value and importance of the ongoing process of reflection.

The collaboration between the CMR team and top management was crucial in creating a shared interpretation of meaning about the findings and their contextualization. The new insights generated through the process of creating shared meaning triggered the development and implementation of specific managerial actions. The ReBUILD case shows in practice how the collaborative process is critical for making M&As work and provide some useful insights on how to manage collaboration between different actors with diverse backgrounds.

## **Contributions**

This study, in keeping with the action-oriented collaborative approach and based on the discussion of the different elements in the collaborative management research approach, offers contributions to theory, methodology and practice. A fundamental premise that CMR is viewed within the domain of “practical knowing” (Coghlan, 2011) which is different from the positivist scientific knowledge production since it is derived by live experience (Lincoln, 2010; Jones & Jenkins, 2008). Since CMR belongs to the action-oriented family of approaches, a key assumption is that the relationship between researchers and researched shape and affect the outcomes (Jones & Jennigs, 2008). This study demonstrates how this relationship can be fruitful for both theory and practice through the engagement in an CMR effort.

### **Contribution to theory**

The underpinning theoretical question in this manuscript is the extent to which a collaborative management research orientation can generate scholarly knowledge both about the merger process and about possible mechanisms that can enhance such an effort. Three such contributions can be found in this article. First, it contributes to the M&As literature as it offers CMR as a process to complement the traditional orientations that tend to focus on financial matters and issues of compliance. The CMR approach could be relevant also in sustaining the M&As process not only in the initial phases of the M&As deal – as most of the M&As literature – but also in the post-M&As deal phase, as clearly illustrated in the case. Second, the ReBUILD case contributes to CMR as showing how a dialogic attitude does not exclude the adoption of scholarly-based diagnostic tools. Third, the present study contributes to highlight the role and nature of learning mechanisms. This contribution both to learning mechanisms literature and to M&As literature, coherently with what has been just said about the CMR potential role for M&As.

### **Contribution to methodology**

The present study contributes to CMR and action research methodology literature. In particular, it addresses two main points. First, with applying a specific framework to evaluate the quality of the research in the realm of practical knowing this paper demonstrates the possibility for collaborative management research to be judged by its own criteria and standards that should be different from traditional research standards. Moreover, the case provides a partial validation to the framework proposed by Coghlan and Shani (2014). Specifically, table 3 illustrates how adopting the six specific criteria allow to evaluate the rigour of the case and at the time capture its essence. Second, the article contributes to CMR methodology in showing the adoption and the effectiveness of different collaborative tools both within the research team and at different levels of the organization, as highlighted in the discussion section.

### **Contribution to practice**

Managers faced with the dilemma posed by the CEO at the outset of this article may consider adopting a collaborative management research approach that will assist in both addressing the challenges of managing M&A and in building learning mechanisms that can facilitate learning and enhance the potential embedded in the merger. This insight is based on the experience that there is no silver bullet for making M&As work, since the effectiveness of such a complex transformation is affected by wide variety of contextual variables that not always are identifiable *a priori*. What makes possible for M&As working is the engagement, at different level of the organization, in an ongoing reflection about the company involving the different parties. In doing this, learning mechanisms are the key: fostering the continuous reflection and learning can be pursued with specific cognitive, procedural and structural learning mechanisms. Second, that CMR methodology can be adopted as a managerial tool to foster collaboration between the different key players, helping the achievement of a real successful merger.

Following these general considerations, we can suggest few specific points for managers that deal with M&As efforts: (1) Adopting CMR as a guiding managerial framework to design and lead the M&As process, designed phases, tools and methods. (2) Designing and managing different learning mechanisms as a managerial tool throughout the different moment of the post-merger deal, to foster communication at the different levels and between different parts of the organization and engage in an ongoing data collection and shared sense-making process. (3) Looking at the M&A process as a collaboration process, that involve different stages of development and maturity, and as such managing it with the aim to achieve alignment of purposes and development of shared language and understanding.

### **Limitations of the study**

As any study, also this one presents some limitations. The most evident one is the new CEO's decision to put the project on hold. This decision can be attributed to a compilation of factors, namely being new and the need to figure out a very complex company that is embedded in many change initiatives, pressure from the board of director to increase bottom line profit (even though the company generated profit during the past three years) and, the complexity and dynamism of the real estate funds market. The new CEO chose to focus on and channel energy and resources to address strategic challenges decisions in terms of new products and services and cutting on what he viewed as less essentials. The nature of the CMR process and experience coupled with the learning mechanisms that were put in place created basic foundation for a different way of learning and organizational dialogue that is likely to enhance the work that results from such shifts in strategic company's intent. A second limitation is that this study reports on a single case, as all action research projects do, and it does not seek to create universal knowledge. However, as the three areas of contribution propose, there is valuable process knowledge generated that is transportable to other settings.

## Conclusions

Action research is no longer considered to be a unitary approach but rather a broad family of approaches that are grounded in core values of being action-oriented and collaborative. Modalities within that family have their origins in the generative insights of those who framed them initially and emphasized a particular orientation to inquiry and action. Collaborative management research is one such modality. Its contributions are in both within its definitional terms and in its demonstration of a modality with the broader action research and organization development.

As demonstrated in the ReBUILD case action research through collaborative management shows the capacity of enabling the organization to address its merger–integration challenge by creating the environment for its members to engage in rigorous, reflective and relevant inquiry and action. At the same time when undertaken in terms of established quality criteria, it shows the capacity of conducting research that is rigorous, reflective and relevant.

Organization development through action research and collaborative management research is continuously evolving as it can adapt and respond to the variety of emerging challenges experienced by organizations and OD scholars. OD involves collaborative research in that it has always espoused research *with* people rather than *on* or *for* them. At the heart of most OD research, there is a commitment to the generation of scholarly knowledge that can guide practice. However, the tensions between theory and practice persist. By retrieving the core OD values of action and collaboration between scholars and practitioners this tension may be challenged and rigorous, reflective and relevant OD research may be undertaken.

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