How to successfully change an organization: management perceptions and practices

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Abstract: Organizational development, change and adaptation are complex and challenging tasks that have been widely studied and debated, spanning from general change models and theories on organizational change, to change management theory and strategy literature. Even though issues surrounding organizational change have been extensively studied, the estimated success rates remain particularly low, thus keeping this kind of studies high in the research agenda. This article examines organizational change and adaptation in the context of institutional change. More specifically, the article examines the case of Valio, the biggest Finnish dairy company, and its reorganization and restructuring during the period surrounding Finland's assessment to the EU in 1995. Valio's case is particularly interesting since it involves a well-established "national institution", with rich history and significant economic contribution to the national economy. The purpose of this paper is to explore how Valio's managers perceived the organizational change efforts surrounding the period of EU accession and what change practices were followed. In doing so, the analysis adopts the comprehensive qualitative case study methodology having a descriptive and explorative approach. This approach involves several in-depth interviews with key Valio executives, stakeholders, and industry insiders. The analysis maps and identifies key themes and processes that characterized the change strategy and allowed for the successful organizational change.

Keywords: Finland; organizational change; qualitative analysis; senior management; Valio.

Introduction

Organizational development, change and adaptation are complex and challenging tasks that have been widely studied and debated (e.g., Burnes and Cooke, 2012; Oreg et al., 2011; Choi, 2011; Suarez and Oliva, 2005; Armenakis and Bedeian, 1999). The relevant literature focusing on organizational change extends from the general change models and theories on organizational change (Weick and Quinn, 1999) to change management theory and strategy literature (Whittington, 1991; Ackerman, 1997). Typically, organizational change and adaptation is closely related to strategic internal changes that can involve a series of challenging issues, including management replacement, sections and/or division reorganization, along with other changes in processes and routines (Whittington, 1991; Geroski and Gregg, 1994). Even though issues surrounding organizational change have been extensively studied, the success rates can be as low as 10% (Beer et al., 1990; Beer and Nohria, 2000; Cope, 2003), thus keeping this kind of studies high in the research agenda.

This article examines organizational change and adaptation in the context of institutional structural change. More specifically, the article examines the case of Valio, the biggest Finnish dairy company, and its reorganization and restructuring during the period surrounding Finland's assessment to the EU in 1995. Valio's case is particularly interesting since it involves a well-established "national institution" with rich history and significant economic contribution to the country (Simonen, 1955; Hokkanen, 1980; Perko, 2005a, 2005b). The company was first established as a butter export cooperative, under the name *Voinvienti-osuusliike Valio r.l.* The organization was officially founded in 1905 by 17 cooperative Finnish dairies and its operations were centered in the port city of Hanko. The number of dairy cooperatives involved in this endeavor gradually increased, and by 1917 the number of member dairies was close to 300. In the following years the export activities expanded and further processes and operations were developed, while in 1955 the name of the organization changed to *Valio Meijerien Keskusosuusliike* (translates to "Valio Central Cooperative for Dairies"). In the early 1990s the various member dairies consolidated

into regional dairy companies and Valio became a limited company in 1992 (Valio Ltd) just 3 years before Finland became an EU member.

The purpose of this paper is to explore how the managers of Valio perceived and experienced the organizational change surrounding the period of EU accession and what practices were followed during the transition. In doing so, the analysis attempts to identify and explore the meanings that participant managers attributed to this change process; the article first provides a brief review on the literature and then illustrates the principal investigator's understanding of *what happened* and *what was its meaning*. Early on the first stages of the research and during the data collection it became evident that a central emerging theme was the coop discourse, which becomes a central element for the rest of the paper.

Organizational change and management

Organizational change initiatives are complex and challenging. Estimates of successful implementation of organizational change programs vary, but typically are considered to be as low as 10% (Beer et al., 1990; Beer and Nohria, 2000; Cope, 2003), while other review reports indicate that around 70% of change management programs stall, mainly due to poor results (Shaffer and Thomson, 1998; CLC, 2001; McKinsey & Co., 2006). In overall, the published estimates show that 40% to 70% of change initiatives fail for various reasons (Burns, 2000).

Several studies have focused on the role of management on such changes and the literature on organizational change has typically identified top management as the "change architect" (Johnson, 1987; Pettigrew and Whipp, 1991). It has even been proposed that successful transformation change cannot be fulfilled with established top management teams, but instead new top management is required that will introduce fresh mental models and routines (Clark and Starkey, 1988; Grinyer and Spender, 1979).

A number of studies examine top management vis-à-vis non-supervisory staff. Covin and Kilmann (1990) studied groups of consultants (external and internal), researchers, and managers, and reported differences across these groups in terms of their understanding of the purpose of change. King et al. (1991) focused on change managers and their differences in perception with the rest of the non-supervisory staff. A series of other studies examined the overall effects of organizational change on supervisors and non-supervisors; typically, non-supervisors faced detrimental effects like overload, lower job satisfaction, lower commitment, and job insecurity (Olson and Tetrick, 1988; Armstrong-Stassen, 1997; Ahmad, 2000). In the same vein of research, Nelson et al. (1995) illustrate how workers' job satisfaction and physical health can relate to the efforts of the managerial staff during times of change.

Ethnographic and case studies in particular, have been extensively used to explore the relationship between organizational change and management (e.g., Pettigrew, 1987; Noël, 1989; Pearce, 1995; Denis et al., 2001; Pitcher and Smith, 2001). Pettigrew (1987) examines organizational change through the lens of three distinct dimensions – context, content and process, and addresses change issues in terms of *why* and *what*. Noël (1989) examined the role of top management on organizational change focusing on preoccupations and obsessions, while Pearce (1995) focused on power. Denis et al. (2001) also focus on top management but in terms of action and process, while Pitcher and Smith (2001) identified the importance of managerial values.

Data Collection and Methodology

The research data include publications in the form of industry reports, news bulletins, statistical reports and firm publications. Four books have been published over the years focusing on the history of the organization (Simonen, 1955; Hokkanen, 1980; Perko, 2005a, 2005b), where (Perko, 2005b) has specific references to a series of articles from Valio's own magazine *Maito ja me* published in the 1990s regarding the EU accession. The main data source was thirteen personal in-depth semi-structured interviews with a purposive sampling (Patton, 2002, p40) of Valio management employees, executives, past directors and industry insiders. The semi-structured interviews only mentioned some topics of discussion, thus allowing a flexible approach to interviewing (Yin, 1994). The interviewees were encouraged to let their responses go beyond the scope of the interview and provide stories and anecdotes they felt were important to understanding the examined processes. Participants were individually interviewed privately and each interview lasted from 60 to 90 minutes. All necessary measures were taken to ensure confidentiality and data integrity, both during the interview and later with the anonymization.

The main data are therefore qualitative in nature and their understanding comes though qualitative inquiry and inductive reasoning (Denzin and Lincoln, 2005). To understand this complex phenomenon we follow constructivism and thus take into account the multiple and equally valid "realities" experienced by the participants (Schwandt, 1994; Hansen, 2004). The philosophical underpinnings of such approach are based on interpretivism – an orientation that maintains that the understanding of the phenomenon lies on the perspectives of those who lived it and made

sense of it (Schwandt, 1994; 2000). However, note that both "qualitative research" and "interpretivism" are neither precise nor agreed terms (Kincaid, 1996).

To understand the data we followed a general inductive approach, where the data were allowed to "speak for themselves" through the emergence of conceptual categories and descriptive themes. The emerging concepts were then embedded into a framework of interconnected ideas that "made sense" and were interpreted by reference to the literature (thus allowing for the possibility of different interpretations). The stages of data collection and analysis were inseparable and the researcher was constantly moving between the two stages (Merriam, 2009). When necessary, certain arguments and propositions are supported by the own words from the participants – illustrating in this way their own understanding of the "reality" they experienced (Taylor and Bogdan, 1998). Even though a computer program was extensively used to handle the data (Huang, 2011), the researcher remained the main instrument for understanding and analyzing the data (Denzin and Lincoln, 2005).

Understanding and analyzing the data

This section involves a "systematic search for meaning" within the collected qualitative data (Hatch, 2002). In doing so the data are analyzed – i.e., the researcher enters a stage of "organizing and interrogating data in ways that allow … to see patterns, identify themes, discover relationships, develop explanations, make interpretations, mount critiques, or generate theories. It often involves synthesis, evaluation, interpretation, categorization, hypothesizing, comparison, and pattern finding" (Hatch, 2002).

The exploration of the data was iterative and interpretive in nature. Constant comparison analysis (i.e., coding) was undertaken inductively (e.g., the codes emerged from the data). Open codes were initially used, while later these codes were grouped together in axial coding and abstraction (Polit and Beck, 2004). A series of relational strategies were employed in order to cluster the data into meaningful categories and then interpret them by reference to relationships that also emerged from this data reduction. In that respect, data collection and analysis were inseparable where thematic analysis uncovered patterns among the emerging categories (Merriam, 2009). For instance, Figure 1 illustrates the abstraction process of formulating the thematic category "coop challenges".

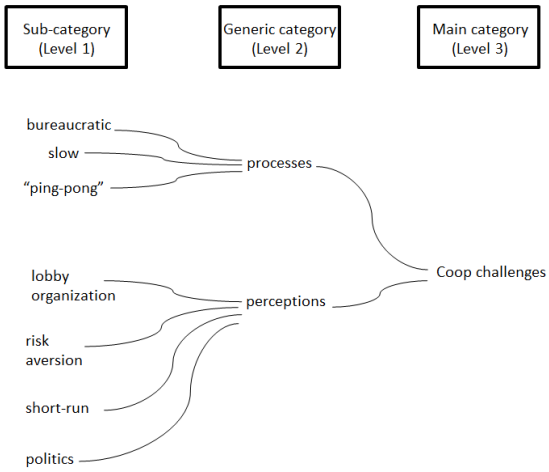

Figure 1: Example of formulating main thematic categories with the abstraction process– the case of the thematic category "coop challenges".

Following similar qualitative approaches, the researcher kept regular field notes and personal journals in order to remain aware of the fact that he is the principal "instrument" of data collection and interpretation (Guba and Lincoln, 2005). The latter realization is particularly important since researcher's own conceptions and behavior can affect the inquiry (Russell and Kelly, 2002). Reflexivity can support the reliability and the validity of the research (Stake, 1995; Merriam, 1998; Glesne, 1999; Russell and Kelly, 2002); ongoing self-examination of oneself as researcher and the research relationships needs to expand through the whole body of the research process so that the researcher will remain constantly self-aware of his own impact (Figure 2).

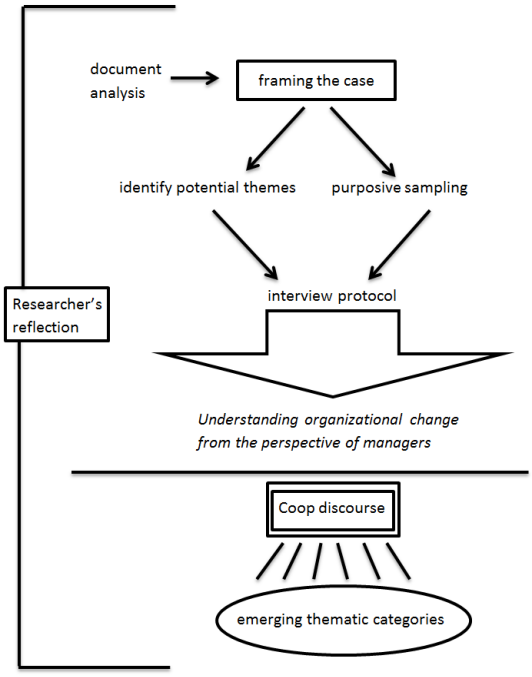

Figure 2: Reflexivity and the research process.

This iterative data exploration process revealed that the coop origins of the organization retain a profound and lasting impact that becomes the central theme connecting the other emergent thematic categories. The coop origins therefore, set a strong dominant logic that defines the organization and its efforts towards change. It is upon this central theme where the main identified dimensions are settled: history and traditions, perceptions, and change processes (Figure 3). These peripheral dimensions remain interrelated and in several occasions it is difficult to set clear boundaries. The rest of this section discusses each of the thematic categories; special focus is given to the consultation dimension since it responds to a particular process of negotiating change within the organization. This negotiation emerged as a continuous and iterative process, a dialogue between formal and informal governance elements of the firm that established the need to change (*why our organization needs to change?*) and the change strategies (*how our organization will change and adapt?*).

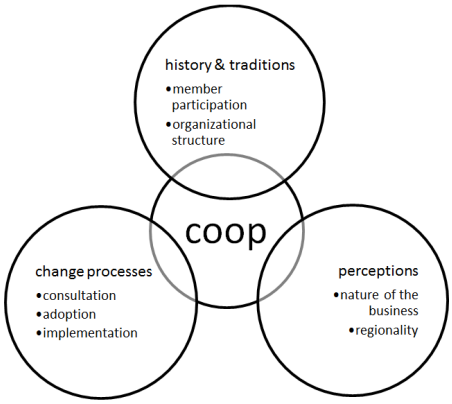

Figure 3: Coop discourse – conceptual thematic map.

History and traditions

Valio started as an export cooperative in 1905, owned by 17 member dairies. The year 1955 marked the 50th anniversary and Valio changed its official name to Valio Finnish Cooperative Dairies' Association, while in the early 1990s, the various dairies consolidated into regional dairy companies and finally Valio became incorporated in 1992 as Valio Ltd (Perko, 2005b). Valio remains incorporated with issued shares that are fully owned by the

regional coops – thus, the producers who are members of their regional coops also own the incorporated company. Even though during the transformation period Valio was not technically a coop, still the coop traditions, styles and governance remained.

"Valio is a cooperative dairy business, it is [now] a limited company… it says it has a Valio Ltd behind [its trademark] but it operates like a cooperative…"

Perhaps the most significant manifestations of these traditions were in governance. For the best part of the change process the Board was comprised by milk producers from the biggest cooperatives that had active role in decision-making and planning.

"…in the Board of Valio all the members are milk producers from the biggest cooperatives. So they [all] had to work together and speak to the people to the cooperatives [their corresponding members] …"

Valio's cooperative characteristics affected the successful change process "very much, because all the decisions were approved in the Board of Directors that consisted only from farmers... milk producing people… so Valio had nobody (from) outside… all the Board of Directors and the Council above the Board of Directors consisted only of milk producers…". There was a very clear perception within the organization on what the company truly was and how it was expected to operate. This particular understanding on the nature of the firm became central on everything related to the need for change and the change strategy.

Perceptions of the managers

The strong coop background greatly influenced the way the management team perceived the organization, especially when examining daily operations and routines. Some executives that had a more "business-oriented" background perceived the company as a remnant of a lobbying organization.

"…the [Valio] company was not like a 'normal' company…the history had it that the dairy farmers (the members of the cooperatives) felt that they were members of a lobbying organization and not owners of a company – that was a very important task to understand and get the people to understand that they are owners of a company which is a valuable company and it is also the owners' responsibility to develop the company…"

The above perception regarding the nature of the business was partly fueled by power relations and regional politics that had shaped the organization over the years. Power relations were expressed with the active member participation to all decision-making fora within the firm. Regional politics became particularly prevalent in the early 1990s when the various regional dairies negotiated their consolidation into Valio. There was strong resistance by some smaller regional coops – their main argument was that the merger would create a huge 'faceless' company that would be hard to efficiently manage and properly control. At the same time, however, it was widely perceived that those managers that resisted to the merger where simply protecting their office.

"…who was against that?… mostly it was the managers of the local dairies and it is understandable…humanly understandable, because they saw that if this big organization is to [take shape] then their position will be null after that… of course nobody said that…but that is the real reason…"

Regional politics also surfaced when discussing different strategies for the rationalizing and streamlining of the business, as part of the overall change strategy. These politics involved not only plant decisions but also personnel.

"…there were of course a lot of politics also …if you close a plant in northern Finland we have to close also in eastern … so that every part of Finland is somehow handled in the same way …"

"I remember at that time of course it was very much discussion about people that working in Helsinki against the countryside. If you close dairies you have to cut people also from Helsinki…for example on that time it was forbidden to call our head office 'head office' because 'head office' was somehow bad word…It was [called] the 'operational center' at that time…"

In overall, a big part of these disagreements were based on the perception that the business offices in the capital were in essence different (i.e., less important) than the "real production units" that operated across the countryside.

"…in the [regional] cooperative dairies, the people there typically thought that there are too many people in Helsinki in the marketing and R&D and all that…and they are not making 'real work'…'real work is here' and 'why we have to pay for them' and 'we could do it better ourselves'…so it was I think all the time it was this certain friction of Helsinki and the other parts of the country…"

The management team had to balance between power structures and regional units when designing the change strategy. The inclusion of member farmers in the decision-making and the strong regional relations within the firm created unique challenges for the management that profoundly affected the processes behind organization's change.

Processes: consultation, adoption, implementation

The various processes supporting the change of the firm were heavily influenced by its history and traditions, as well as the management perceptions – all of which were heavily based on the distinct nature of the firm as a historic coop. Particularly interested is the fact that coop traditions heavily favored democratic processes and high consensus, which were both considered impediments from most manager respondents. On the other hand, transparency, inclusiveness and the inherent broad legitimacy that also followed the firm's coop history were considered as an advantage that played a crucial role in successfully changing the company. We examine the change processes in terms of consultation (negotiating change), adoption (accepting a change strategy) and implementation of change strategies.

Consultation

The decision-making process was characterized by the study participants as "bureaucratic", "slow" and "time consuming" – all characteristics that responders also identified with the coop traditions and practice.

"…many people from the business community in Finland were wondering and asking what kind of shareholders [Valio had] because there were so many people involved and quite a bureaucracy to have the meetings… and we had quite regular and long meetings…"

Farmer participation in management decisions was identified as part of the characteristic coop structure but also as a significant impediment for the change effort of the firm since it slowed down change decisions.

"…the decision-making took quite a long time because of the coop structure… because the decision-making process involved that the farmers also had to approve, they had to approve the ideas at their home base. It might have taken half a year while in a private company that same decision would have been made in one day or one week… but in the coop it could have taken for half a year or even postponed and then taken into again and again… especially if they were closing the dairy then you had that everybody had to be of the same opinion…"

This time-consuming decision-making process was characterized by some respondents as an internal "ping-pong" game where suggestions from the top management would be forwarded through the Board to regional opinion leaders and then come back with counter-suggestions from the member body. In terms of the overall transformation effort of the firm, this "ping-pong" was considered by the management as a necessity but also as an especially weak element.

The consultation process was excessively time consuming – "… [member farmers] understood finally but it took time and a lot of discussions and a lot of challenges…". However, the consultation phase was also understood as being transparent and inclusive. Participants were allowed to freely express their opinions and top leaders of the organization remained in close touch with the members and in many instances tried to personally communicate their ideas, for instance when "…standing two hours in the auditorium with 200 farmers that made questions all the time…".

"…You have to have good numbers and good [arguments]…'why we are doing that'…"

Different elements in the organization negotiated on change – member farmers, local opinion leaders, and Board members. That was a time-consuming, iterative process that however was deemed necessary given the coop background of the organization and its effect on governance. This negotiation on the need and meaning of change helped the organization members to "make sense" of the issues (Gioia and Chittipeddi, 1991) and prepare adoption and finally the implementation of the agreed change strategies.

Adopting change

It was understood that in order to remain relevant in the marketplace, the company had to undergo through a series of actions aiming at rationalization and streamlining, and ultimately lower its costs to competitive levels. However, one thing is realizing what has to be done and another is accepting the necessary measures, since "...the farmers were ready to close down the neighbor's dairy but not their own..." In addition, several responders understood the coop members as being particularly conservative and risk-averse, with a focus in the short-term.

"...I think that with all cooperatives the long-term thinking and risk-taking is not an easy issue.... [they tend to be] conservative, risk-averse and [focus on the] short-term."

Overall, the adaptation and the smooth implementation of the transformation initiatives later, were attributed to opinion leaders, the extensive farmer involvement and the transparency of the various processes.

"…one good things was that there were a lot of good information available, very well prepared from everybody; there were opinion leaders that were ready and very well involved… even those leaders who did not wanted to be involved they were asked every time… all doors were open to join and they were not blamed if they had some alternatives… and of course they were also some good farmers who associated to just to tell to the members of their coops just using the real words so that people understood that this kind of process is not only the big leaders or managers somewhere in Helsinki that they are planning to do something for us…".

The opinion leaders were local agents that effectively became the communication and negotiation medium between management and the member base – between official and unofficial governance structures in the firm. It is not possible to fully recognize the impact of these opinion leaders on the overall change effort but it was widely accepted among our respondents that opinion leaders, especially on the regional level, played a critical role in facilitating the change process.

Implementation

The implementation stage was an area where the coop identity of the organization is also believed to have made a big and critical difference. Many responders casually contrasted their organization with an Investor-Owned-Firm (IOF) and some of them reflected on their previous experience from non-coop businesses. The main reflection was related to the speedier change implementation that was attributed to two main themes: the better understanding of the process and its necessity, and the more elaborate and complete consultation and communication among the interested stakeholders.

"… in the cooperative world it takes longer time because you have to 'bring up' the possibility for the Board Members to communicate the issues and get the background for the decision-making before any final decision is taken. So I say that sometimes cooperatives discuss very much but then even though the decision-making process is longer, the implementation process is shorter because the decisions are better understood and they are easy to be communicated at that stage when the decision is taken…"

The adoption and implementation stages made salient the different change strategies within the organization. Interestingly, in the case of Valio the implementation stage brought ambidextrous strategies that combined rationalization and streamlining of operations with investments in selected company areas (Lamprinakis, 2015). The change agents where those who negotiated change in the first place: coop members, opinion leaders and the top management as expressed through the Board.

Discussion

Analyzing the data reveals the main emerging themes and the coop discourse that surrounds and largely defines them. History and traditions is the broadest enclosure that sets up the cultural values, daily routines, and essentially helped define the dominant logic of the organization (Gioia and Chittipeddi, 1991; Bettis and Prahalad, 1995). This dominant logic (also called "interpretive scheme") partly shaped organizational behavior through perceptions and processes. Perceptions are considered here in terms of social cognition – i.e., understanding the social world and how different actors can affect individuals. Awareness of social interactions was focused through the lens of the various processes, the latter including both social processes and functions. The social processes are understood as the different ways of interactions between stakeholders and groups, forming relational systems and changes that disrupt existing modes and behaviors. The two-way interactions were maintained throughout the examined change period and were based on deeply rooted traditions and values. The functions highlight three central stages of adaptation: consultation, adoption and finally the implementation. These main thematic categories surrounding the coop discourse have emerged as complex thematic fields where different concepts and facets that interrelate (Figure 4).

Transparent and inclusive consultation built up the legitimacy of change management and the need for organization change. The nature of the organization, however, required a gradual, iterative procedure before any adoption measures could be accepted. Local opinion leaders and open communication channels played a key role in adopting change strategies and mobilizing change agents across the organization. The established robust support, strong local legitimacy and extensive negotiations on change allowed for a swift implementation of new strategies and the efficient change of the organization.

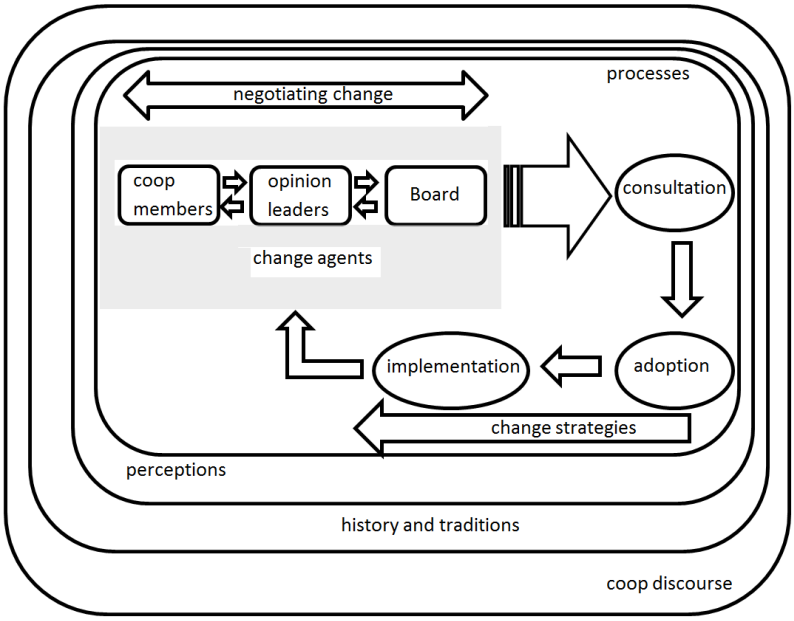

Figure 4: Theme interrelations and interactions.

A central element that emerges is the open and continuous interplay among members, opinion leaders at a local level, and the Board. Unofficial communication channels were not only allowed and tolerated, but instead were actively encouraged so that the bulk of the organization could actively participate from the early stages of the change effort. This interplay is identified here in terms of negotiating change within the organization and becomes the core of the consultation process. The adoption and implementation stages that followed kicked off the actual change strategies that were implemented organization-wide with the active support and participation of the change agents: farmer members, local opinion leaders, and the leadership.

Summary and Conclusions

The article explores the process of organizational change and adaptation and in particular how managers understand such changes and the practices followed during the change period. In doing so, the analysis focuses on Valio and its restructuring and response strategies towards Finland's EU Membership in 1995. After several years of restructuring and changing in its business model the company remains a major player in Finland and one of the most well-known brands in the region. The analysis is based on the comprehensive qualitative case study methodology following a descriptive and explorative case study approach.

The paper presented a brief overview of the literature on organizational change and the associated management perceptions. The literature typically focuses on top management teams and how they can be differentiated from the rest of the employees. Several qualitative studies are part of this literature either in the form of ethnographic or case studies. The rest of the paper follows the latter venue; we first undertake a document analysis and then engage in semi-structured in-depth interviews with past management employees. The "understanding and analyzing the data" section reveals the main emerging themes and the coop discourse that surrounds them. The main thematic categories surrounding the coop discourse have emerged as complex thematic interrelated fields, where different concepts and facets interconnect.

The change process arises through the interaction of a series of complex, interrelated elements, where official and unofficial governance structures negotiate, approve, and finally implement change strategies. The coop discourse is a central element that defines the organization and all other elements of the change initiative. After extensive and iterative negotiations on the meaning and understanding of change, an extensive cluster of change agents arose within the organization and helped the firm to efficiently change both in terms of business models and organizational structure. Even though it is not suggested that one should generalize the findings of our research, these findings nevertheless shed more light on the ongoing research surrounding management perceptions and general practices supporting organization change. In the present turbulent economic conditions, efficient change is the one element that remains crucial to organization survival.

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