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**Demystifying Agile:**  
The case of a fantasy project?

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## **Abstract**

This paper aims at demystifying the agile way of working and to improve the understanding of the concept. We do this through a case study of a large bank which initiated a transition to agile five years ago, a transition which can be categorised as an attempt to shift from being bureaucracy to post-bureaucracy. To reach our aim, we engaged in in-depth interviews, observations, and document analysis all within the interpretivist tradition to capture the employees' sensemaking of their new way of working. In this paper we propose three alternative meanings of agile, namely 'agile as an envy generator', 'agile as standardisation', and 'agile as managerial boredom'. These stand in stark contrast with the established understanding of the concept in much of the literature and the general business discourse as 'agile as an organisational panacea', and thus we shed new light on this fashionable way of working.

**Key words:** agile, agile methodologies, post-bureaucracy, organisational change, management fashion, sensemaking, organisational culture

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# 1 Introduction

Agile. A word with definitions involving the ability to “move quick and easily” and to “think and understand swiftly” (Oxford Dictionary, n.d. a), and with synonyms such as “lively”, “energetic”, and “sharp” (Thesaurus, n.d.). There is no doubt about the word’s positive connotation, but in the recent two decades agile has become much more than just a word. Agile has ascended to become an umbrella term for an increasingly popular range of methods for organising work within the post-bureaucratic tradition (Collins, 2005), with particularly widespread use within software development.

Being agile in this sense implies the ability to respond to changes in turbulent environments, which is accomplished through self-organising and multi-disciplinary teams (Highsmith, 2002). This is a philosophy built on ideas posed by Takeuchi and Nonaka (1986). Agile teams are self-organised in the way that they themselves can choose how to solve their tasks, and the multidisciplinary aspect is supposedly essential to achieve this, as it enables the team to operate autonomously without relying on external resources.

One important implication of the self-organising and multi-disciplinary team is the necessity of management to trust the team’s ability to take on and share the responsibility that previously lied with the manager. Consequently, the role of the manager diminishes and is reduced to shielding the team from outside distractions along with typical administrative work (Cockburn & Highsmith, 2001). This is a stark contrast to the traditional command-and-control approach often observed in bureaucratic and hierarchical organisations (Moe, Dingsøyr & Dybå, 2010). Therefore, it seems likely that a shift from a bureaucratic organisation to a post-bureaucratic organisation through the adoption of an agile way of working can lead to friction, both due to the shift of power from managers to teams, but also due to the implications related to the unavoidable change in the organisational culture. This friction sparked our curiosity, especially since the general business discourse is dominated by a purely positive and uniform meaning of ‘agile as an organisational panacea’. This is for instance illustrated through how the editor of Harvard Business Review equate the future importance and success of agile as a certainty alongside death and taxes (Ignatius, 2016). Our interest in this rosy pictured phenomenon led to the case study of a well-established Scandinavian bank, referred to as Piggy Bank hereafter, which initiated an organisational

transformation from a bureaucratic and traditional structure to a more flexible and agile structure in 2013.

## 1.1 Agile in Large Bureaucracies

It is easy to imagine that autonomous and cross-functional teams may work well in young and small companies because they are precisely that, young and small. The small size allows for less hierarchy and thus more autonomy, and cross-functionality might be the only possible way in which the few employees can manage their daily operations. A young organisation also implies little or no legacy of traditional approaches embedded in the culture, something which allows for agile to be incorporated in the organisational backbone from the very inception of the company. The Swedish music streaming company Spotify is one influential example of this, and is considered as a lodestar among agile practitioners who also praise the company for having maintained its startup mindset with widespread autonomy despite its tremendous growth (e.g. Mankins & Garton, 2017).

In contrast to organisations like Spotify, large and well-established companies often have an organisational heritage dominated by strict hierarchies and extensive bureaucracy (Grinyer & Yasai-Ardekani, 1981). Therefore, it is interesting that many significant players within what is perhaps one of the most traditional and well-established industries, banking, are adopting agile methods. Examples include major Nordic banks such as DNB (2017), Nordea (2018), and SEB (2017), Dutch banks such as ING (Barton, Carey & Charan, 2018) and ABN AMRO (n.d.), along with Standard Bank in South Africa (Blumberg & Stüer, 2016). Arguably, agile can be seen as the contrary of how banks traditionally operate, with strict budgeting and detailed planning. As a result, it is easy to imagine the drastic shift in organisational culture that a transition to agile could bring about, but also require. At the same time, banking and technology is becoming increasingly intertwined, and agile is by many practitioners considered as *the* way of working for IT development, also within banking. For instance, Hanna, one of our interviews, stated that “*you can’t have a modern IT environment where people aren’t working agile*”.

Nevertheless, shifting from being a bureaucratic to a post-bureaucratic organisation is a radical change, and one critical uncertainty is whether it actually is possible to successfully accomplish a transition of such a scale. Still, most of the attention around agile is not on the

change process, but rather on the grand claims and ‘glossy pictures’ portraying increased productivity, improved quality, enhanced job satisfaction, and higher rates of innovation (e.g. Rigby, Sutherland & Takeuchi, 2016). It is important to note that as a result of the view of ‘agile as an organisational panacea’, a multitude of positive attributes have been associated with agile. Our aim is not to scrutinise these claims, and thus we use them somewhat interchangeably throughout this paper to highlight the magnitude of these advertised benefits.

## **1.2 Research Objective and Disposition**

Whilst the small amount of academic research on agile can be described as inconclusive in relation to the grandiose promises above, this is not within the scope of this paper. Rather, our study is an attempt to ‘demystify’ agile. That is, to develop an improved and in-depth understanding of the softer aspects that a shift to agile entails. More specifically, this study aims to answer:

*How do managers and team members experience the shift from a bureaucratic way of working to an agile way of working?*

This question remains largely unanswered in the current literature. Some studies within information science have explored some soft aspects by investigating the link between culture and agile on a broad level (e.g. (Nerur, Mahapatra & Mangalaraj, 2005; Strode, Huff, and Tretiakov, 2009). However, within organisational studies there appears to be no previous literature on agile specifically, although similar ways of working, such as self-managing teams, have been subject to profound scholarly scrutiny (e.g. Barker, 1993). This lack of research may be a result of the fact that mainstream adoption of agile is a recent phenomenon, but the increasing popularity within established industries has created a need for improved insights into the implications of agile. We attempt to contribute to this through our case study of Piggy Bank. Consequently, this study proposes three alternative meanings to agile which unravel problem areas that a shift to this fashionable way of working may entail, which complements the current understanding of the concept. These problem areas include envy, standardisation, and boredom among middle managers. We believe these



insights are applicable for both scholars within organisational studies, but also for the preachers of the post-bureaucratic methodology that agile is.

However, these three alternative meanings do not themselves provide a complete picture of agile as there are many pieces to that puzzle. Accordingly, this paper first offers a review of the literature within the domains of agile along with the intertwined topics of post-bureaucracies, organisational culture, and management fashion. Subsequently, we elaborate on the methods utilised to answer our research question. This involved the collection of empirical data through in-depth interviews, document studies, and observations, all of which was analysed in accordance with the interpretative tradition. Following the description of our methodology we present excerpts from our data, along with some initial analysis, before we proceed with our main findings and the implications of our study. Here, we present our three alternative interpretations which enrich the established meaning of 'agile as an organisational panacea'. Specifically, 'agile as an envy generator', 'agile as standardisation', and 'agile as managerial boredom', before we round off with a conclusion and suggestions for future research.

## 2 Theoretical Background

This chapter aims at providing a thorough review of the relevant literature and in this way, form the theoretical base for our study. The chapter commences with a brief overview of the essential aspects of the agile methodologies, its close connection to organisational culture, a contextualisation of agile as a management concept, along with a section relating agile to the literature on management fashions. While the analysis and findings in this paper are moving into somewhat uncharted territory within agile specifically, similar research has been carried out for other post-bureaucratic practices which bear close resemblance to agile, such as self-managing teams.

### 2.1 The Origin of Agile

As mentioned in the introduction, the ideas behind agile are considered to have been born in an article by Takeuchi and Nonaka (1986), with roots tracing back to lean manufacturing. These ideas were developed into multiple frameworks tailored for software development during the second half of the 1990s and the first half of the 2000s, and include Extreme Programming (XP), Crystal Methodologies, Feature-Driven Development, Kanban, and Scrum. These practices are all regarded as ‘agile’ and were introduced by practitioners to offer alternatives to the traditional software development approaches involving extensive and detailed planning (Dybå & Dingsøy, 2008).

In 2001, seventeen of these practitioners came together to develop the ‘Agile Manifesto’ (Beck et al., 2001a). This manifesto is based on twelve principles that emphasise customer focus, flexibility, speed, simplicity, and teamwork. These principles are based on a core consisting of four value statements: “Individuals and interactions over processes and tools”, “[w]orking software over comprehensive documentation”, “[c]ustomer collaboration over contract negotiation”, and “[r]esponding to change over following a plan” (Beck et al., 2001a). Moreover, the manifesto emphasises that agile is mainly about “the *mushy* stuff of values and culture” (Beck et al., 2001b). Thus, whilst agile methods like Scrum come as a toolbox with artefacts such as special meetings at regular intervals and advanced to-do lists, the founders believe it is the cultural change and the adoption of new values which are important.

The most distinct differences between agile and traditional software development approaches involve an adaptive development process compared to the extensive planning found in more traditional methods. Agile also revolves around people instead of processes, focus on leadership and collaboration rather than a command-and-control forms of management, informal conversations instead of formal communication, and an advocacy of interchangeable roles in contrast with specialised roles (Nerur, Mahapatra & Mangalaraj, 2005). In other words, there is a notable difference between these two managerial approaches where agile can be said to embrace collaborative development, acknowledge the uncertainty involved in the development process, and move the customers and users from the back seat to the passenger seat (Dingsøyr, Nerur, Balijepally & Moe, 2012). This supposedly leads to benefits within many overlapping domains, and whilst the specificity of the claims varies, they generally include higher organisational flexibility along with improved productivity, product quality, and job satisfaction (e.g. Rigby, Sutherland & Takeuchi, 2016).

## **2.2 A Contextualisation**

Despite the impression one might get that agile is a novel concept, many similarities can be found with previous managerial concepts. The key element in agile is the self-organising team, but this way of organising work can be traced back many decades. In one early study, Trist and Bamforth (1951) explored the consequences of ‘self-regulated’ work groups subject to ‘responsible autonomy’ in a British coal mine where the workers even formed their own teams. The authors conclude that this innovation in management practices led to increased productivity, and “impressive” improvements related to the workers life quality, including their social well-being and decreased sickness and absenteeism, which closely resembles the positive changes frequently attributed to agile.

In general, self-managing and self-organising teams can be characterised by a large degree of autonomy and can be considered as the opposite of hierarchical and bureaucratic forms of management which are guided by organisational rules and policies. The use of the latter has been widespread in modern organisations, and still is to some extent (Alvesson & Thomson, 2006). However, bureaucratic organisations have been criticised by several scholars. For instance, Child and McGrath (2001) argue that bureaucracies are inflexible in the face of uncertain and changing environments, which is precisely what the agile frameworks attempt to tackle. Moreover, Weber (1976) argues that bureaucracies gain

control over the organisational members by forming their understanding of how to behave, and thus create an 'iron cage'. Additionally, Heckscher (1994) highlights the prevalent organisational segmentation in large bureaucracies, where individuals are only responsible for a fixed set of tasks. This leads to an isolation of the organisational top-layer, and a segregation between 'thinkers' and 'doers' (Alvesson & Sveningsson, 2016). Consequently, the top-layer in a bureaucracy is where crucial decisions about strategy are made, and the remaining layers are responsible for the implementation of these (Heckscher, 1994). Thus, bureaucracies are neutral and fair systems where personal relationships are of less importance due to its reliance on rules, but with autonomy and individual freedom along with organisational flexibility as notable sacrifices.

However, in recent decades there has been a notable shift away from bureaucracies, and many have argued for the emergence of a post-bureaucratic era where power and responsibilities are shifted to employees (e.g. Johnson, Wood, Brewster & Brookes, 2009; Josserand, Teo & Clegg, 2006), and agile is undeniably in line with these ideas. Post-bureaucracy, which Hodgson (2004) characterises as a 'seductive' concept, nullifies what is often analogous with bureaucracy, such as rigidity and inefficiency (Grey & Garsten, 2001). Yet, this does not mean that there is anarchy in post-bureaucratic organisations, instead, order is achieved through 'concertive' control, which is the result of a negotiation process of acceptable behaviour among the organisational members (Tompkins & Cheney, 1985). This is arguably a more democratic and autonomous way of organising work, and some research suggests that such practices foster higher productivity and improved job satisfaction (e.g. Cohen & Ledford, 1994), benefits which may appear familiar from the domain of agile.

One influential study of a manufacturing organisation by Barker (1993) illuminates an alternative angle of post-bureaucracies. He adopts Weber's metaphor of the 'iron cage' when describing the outcome of a transition from a hierarchical and bureaucratic management approach to a structure consisting of self-managing teams. It seems sensible that in such a transition, the organisational members would experience increased autonomy and individual freedom. Yet, Barker (1993) found that the opposite occurred. The concertive control appeared to be more powerful, less overt, and harder to resist than the control exerted by the hierarchical bureaucracy, which consequently led to a tightened 'iron cage'. The group values became increasingly important, and individuals who did not identify with them could be subject to social exclusion and even dismissed by their colleagues (Barker, 1993). This is one

interesting finding about the implications of moving from a bureaucratic organisation with command and control systems to a post-bureaucratic organisation with self-managed teams.

Nevertheless, one important difference between the *self-managing* teams in Barker (1993) and the *self-organising* teams in agile is the degree of autonomy. Whilst the former involves the elimination of middle management altogether and the transfer of hiring decisions to the self-managing teams, the latter only implies that middle management should not interfere with the self-organising teams' work (Hoda, Noble & Marshall, 2010). This may dampen the effect of the control mechanisms demonstrated by Barker.

### **2.3 The 'Mushy' Stuff**

In the aforementioned manifesto, the authors particularly pointed to values and culture as important ingredients for being agile (Beck et al., 2001b). Lindvall et al. (2002) also argue that being agile is a question of organisational culture. Thus, the cultural aspects of agile are integral in understanding how organisational members perceive it.

Organisational culture is a concept with a broad array of interpretations. Deal and Kennedy (1982) describe organisational culture as "the way things get done around here" (p. 4), whilst Alvesson (2002) describes culture as "everything and consequently nothing" (p. 3). Moreover, Hofstede, Neuijen, Ohayv, and Sanders (1990) argue that culture is a historically anchored collection of values and beliefs, whilst Martins and Terblanche (2003) attempt a narrower definition by describing organisational culture as a shared system of meanings which is based on innate values and beliefs with a proven track-record in the organisation. They further argue that this is what leads to a mutual understanding and effective communication among organisational members.

One widespread understanding of organisational culture is stemming from the work of Schein (1985) and separates culture into three levels; assumptions, values, and artefacts. At the foundation of any culture lies the core assumptions, or rather the unquestioned beliefs. This means that any behaviour that is not aligned with these assumptions would be regarded as unthinkable (Schein, 2017). For instance, it might be unbelievable for a software developer to divert from a development plan provided by a manager in a traditional command-and-control organisation where one of the foundational assumptions is that the senior managers possess superior insights. One level above the basic assumption lie the values and beliefs that

are being embraced in the organisation. These touch on similar areas as the basic assumptions, but differ in the extent to which they are ingrained in the organisational culture (Schein, 2017). Thus, a culture which values collaboration and teamwork might have a flat hierarchy, but it is still not implausible that the employees occasionally have to act on orders from their managers. At the very surface are the cultural artefacts, which are the visible and audible outcomes of the two underlying layers (Schein, 1985). In the culture that values collaboration, one artefact may entail regular team meetings with the purpose of consensus-based decision-making.

These definitions highlight the somewhat diffuse nature of organisational culture. One additional aspect that complicates matters even further, is that subcultures tend to emerge in sizeable organisations as a result of large intra-company dissimilarities between both groups and individuals, but also managerial differences (Alvesson & Sveningsson, 2016; Schein, 2017).

## **2.4 The Transition to Agile**

Hofstede et al.'s (1990) argument regarding the historical anchoring suggests that there may be challenges related to cultural change. This is in line with Schein (1999), who considers culture as stable and difficult to change as it is a product of the aggregate learning among its members. This also explains Schein's (1999) scepticism for the efficacy of short training programmes aimed at altering culture, a classic element in organisational change initiatives.

This stable nature of organisational culture highlights a problem area for established and hierarchical bureaucracies with a desire to adopt agile, as it involves a radical shift away from their status quo (Cao, Mohan, Xu & Ramesh, 2009; De Cesare, Lycett, Macredie, Patel & Paul, 2010; West & Grant, 2010). Meyerson and Martin (1987) argue that organisations *are* cultures, and consequently Alvesson and Sveningsson (2016) highlight that no change can be culture free. Hence, bureaucracies dreaming about post-bureaucracy are bound to face substantial organisational and cultural change to reach their goal.

One discussion that has emerged in the past decades, especially in the scholarly field, is whether change is manageable at all. This is a result of the fact that change initiatives often have different outcomes than the initial objectives (e.g. Harris & Ogbonna, 2002; Mintzberg, 1978). Additionally, a small meta-analysis of cultural change initiatives by Smith (2002)

concluded that only 19% were successful. Although success in this domain involves notable subjective judgment, this highlights some of the challenges involved.

One common issue related to cultural change is that the change initiators often set out to change 'it' or 'them' without including themselves in the equation (Alvesson & Sveningsson, 2016). A widespread practice seems to be that top management, possibly with the help of consultants, identify what needs to be changed and then attempt to convince the organisational members to adopt the relevant values and beliefs (Alvesson & Sveningsson, 2016). Unfortunately, reality appears to be less straightforward. For instance, Balogun and Johnson (2005) found that social processes among middle managers had a notable impact on the outcomes of change initiatives. Moreover, it has also often been suggested that people construct their identities around their work (Alvesson & Sveningsson, 2016), and organisational changes may therefore rock the very foundation of their identities, which again may result in resistance and opposition for the proposed change.

Josserand, Teo, and Clegg (2006) documented such identity issues at both the individual and the organisational level in a study of a public-sector organisation subject to a transition in line with post-bureaucratic ideas. Perhaps it is due to these difficulties that it is common for flat, post-bureaucratic structures to coexist with vertical hierarchies (Alvesson & Thompson, 2004). Another potential reason is the aforementioned segregation of organisational layers emphasised by Hecksher (1994). He argued that attempts of infusing post-bureaucratic structures in organisations with a bureaucratic legacy may lead to the deployment of a hybrid model in which both post-bureaucratic and bureaucratic ideas can be found. Hodgson (2004) highlights that a likely consequence of this is that the post-bureaucratic facets appear as a charade and shed negative light on the bureaucratic aspects that hinder the post-bureaucratic structures. This appears to have the potential to induce both friction and frustration in even the most well-organised organisation. One reason for this is that these changes seem to involve the deep cultural levels of values and assumptions.

Despite the intertwined nature of agile transformations and organisational culture, the current literature investigating this relationship is scarce. The existing studies mainly focus on cultural compatibility through the question of what cultures are best suited for agile practices (e.g. Nerur, Mahapatra, & Mangalaraj, 2005; Strode, Huff, & Tretiakov, 2009). Moreover, this literature is for the most part from the field of information science, and thus do not share the same thorough understanding of organisational culture as found within

organisational studies. Nevertheless, this literature does still provide interesting perspectives also for the purpose of this paper.

For instance, Tolfo, Wazlawick, Ferreira, and Forcellini (2011) argue agile should not clash with existing cultural values, and Nerur, Mahapatra, and Mangalaraj (2005) specify that innovative cultures are, perhaps not surprisingly, better suited for agile than more bureaucratic cultures. This reveals the divergence in the understanding of culture, as bureaucracy arguably is a way of organising work and a manifestation of control as a cultural value, and not a type of culture in itself. Yet, their conclusion is in line with the consensus in their field, and for instance shared with Strode, Huff, and Tretiakov (2009). However, the latter authors also point out that the introduction of agile methodologies is likely to significantly impact the existing culture. Still, this does not appear to have been systematically studied, and it is this combination of the cultural compatibility aspect and the unknown softer implications of agile which make the recent development of traditional organisations adopting this way of working particularly intriguing. The reason for this is that most traditional organisations, and perhaps banks in particular, appear to lack this cultural compatibility through their bureaucratic legacy, and thus are subject to long, difficult, and perhaps even painful change processes with unknown consequences.

## **2.5 Agile and Management Fashion**

Despite its rising popularity, the agile movement seems to mostly be founded on anecdotal evidence (Dybå & Dingsøyr, 2008; Lee & Xia, 2010; Papatheocharous & Andreou, 2014). For example, the availability of positive testimonies in publications such as Harvard Business Review is remarkable. Promises such as boosted motivation, improved likelihood for success, and increased productivity are widespread (e.g. Barton, Carey & Charan, 2018; Cappelli & Tavis, 2018; Rigby, Sutherland & Takeuchi, 2016). Agile has even been embraced by the magazine's editor (Ignatius, 2016). Additionally, consultancies frequently publish success stories from agile transformations (e.g. Mahadevan, 2017; PwC, 2014), which contribute to a one-sided view of agile in the general business discourse.

The few studies which do attempt to objectively investigate the efficacy of the agile frameworks provide inconclusive evidence and are generally of mediocre quality. For instance, both Ilieva, Ivanov, and Stefanova (2004) and Layman, Williams, and Cunningham



(2004) found that agile increased productivity and quality, however these findings are based on small samples, flawed paradigms, and unsatisfactory statistical analyses. Moreover, experiments with more robust research paradigms does not provide any evidence for the superiority of agile over alternative methods (e.g. Dalcher, Benediktsson & Thorbergsson, 2005; Wellington, Briggs & Girard, 2005). This lack of significant evidence for its efficacy raises the question of whether the growing popularity of agile is driven by fashion.

The general idea of fashion-driven organisational change is established by a multitude of scholars who challenge organisations' underlying motivations to change (e.g. Abrahamson, 1996; Abrahamson & Fairchild, 1999; Cram & Newell, 2016). Management fashion theory suggests that certain managerial approaches rapidly gain popularity, but then are passed into obscurity as soon as a new approach is introduced. Some argue that agile is no exception (Janes & Succi, 2012; Moczar, 2013; Sharp, Biddle, Gray, Miller & Patton, 2006), whilst others claim the opposite. The latter group believes that agile will not pass by like a fashion because of its higher productivity and flexibility compared to alternative frameworks (Dingsøyr et al., 2012; Holmström, Fitzgerald, Ågerfalk & Conchuir, 2006; Ignatius, 2016; Nerur, Mahapatra & Mangalaraj, 2005), yet the aforementioned lack of robust empirical evidence makes this legitimate to question.

Cram and Newell (2016) conducted a thorough examination of adoptions of agile methodologies from a management fashion perspective. They found that the booming adoption of agile into mainstream software development has caused disparity between agile in *theory* and agile in *practice*. Three categories were identified and demonstrate different degrees of fashion in agile adoptions. The *Crusaders* are organisations which adopt agile methodologies in its purest form and profoundly believe that agile is a right fit for the organisation and its culture. The *Tailors* take on most facets of agile, and organisational members buy into it them, yet modifications to the agile frameworks are made to better fit the organisation. The third category is the *Dabblers*. These are organisations which adopt merely those agile 'tools' that serve the organisation the most, and use agile practices alongside more traditional ways of working. Cram and Newell (2016) argue that the latter group of organisations are those who often embrace managerial practices on a short-term basis and are happy to jump on the next train that comes their way.

As mentioned earlier, consultancies have arguably been an important driver for the popularity of agile, and PwC illustrates the general discourse in their Retail Banking 2020 report. In the foreword, Sullivan, Garvey, Alcocer, and Eldridge (2014, p.3) write the following:

*Banks need to choose what posture to adopt against this change [of the banking environment] – whether to be a shaper of the future, a fast follower, or to manage defensively, putting off change. Staying the same is not an option. [...] This future will require institutions to be agile and open, ready to explore different options in an uncertain world.*

Excerpts like these demonstrate the sense of urgency that is created by the mainstream discourse. One typical argument to justify organisational change, is that organisations need to adapt to the rapidly changing demands in their business environments in order to stay competitive. A popular expression in management writings is that “change is as inevitable as death and taxes” (Sveningsson & Sörgärde, 2013, p.58). This anxiety to adapt has affected executives and led them to continuously search for new and better approaches to improve innovation and increase efficiency levels. As a result of this seemingly urgent need to change, ‘off-the-shelf’ methods are frequently implemented (Alvesson & Sveningsson, 2016), with the underlying assumption that if the steps of a change plan are followed, the intended outcomes will be achieved (Balogun & Johnson, 2005). However, as previously elaborated upon, organisational change is probably not as simple as text books might imply.

## **2.6 Summary**

In this chapter we have established the theoretical base for our study of how people make sense of a transition from a traditional, bureaucratic organisational structure to a flexible and agile structure. We examined literature on agile and its relation to organisational culture, organisational change, and management fashion theory. Moreover, we contextualised agile by comparing it to related management concepts, arguing that whilst agile may appear novel, its foundation can be traced back many decades.

Additionally, this review demonstrates the relatively one-sided and positive view of agile that the founders and other advocates of the agile methodologies have contributed to. Hence, the result is that agile appears as an organisational panacea in the general business discourse. This provides an understandable link from agile to management fashion theory, yet the question of whether this concept is just another management fashion or a concept that is 'here to stay' is outside the scope of this study. Instead, the scope of this study is to investigate the meaning people ascribe to the glorified concept of agile.

The perspective of this study is further legitimised by the relatively recent phenomenon of traditional, large, and bureaucratic organisations adopting the post-bureaucratic concept of agile. Since this is a growing trend, combined with the fundamental contradictions between these organisations' original structures and agile, it becomes an interesting topic for organisational scholars. Furthermore, when scrutinising the academic literature about agile, we encountered mainly technical studies from the field of information studies. Those studies which do engage in cultural or 'soft' aspects of agile, investigate merely cultural compatibility and are mainly based on quantitative methods. These two points provide an interesting opening for qualitative studies from an organisational theory perspective, and form the basis of our study.

### **3 Methodology**

In this chapter we clarify the steps undertaken to address our research question, and we provide justifications for our approach to make it as transparent as possible. We begin with an elaboration of the overarching approach to the study, which is followed by a detailed explanation of our methods for data collection and analysis. This chapter also includes considerations that are critical to acknowledge in relation to this study.

#### **3.1 Research Approach**

Schein (2017) argues that the method used for a study should be determined by its purpose. Drawing on this line of thought, it is vital for our study to gain understanding of how people make sense of their new and agile way of working to answer the research question. Therefore, the overall aim of our approach was to gather rich data on the employees' individual experiences of agile along with the closely related change process through well-founded, qualitative methods.

By focusing on only one company, we strive to gain an in-depth understanding rather than quantitative breadth. This makes a qualitative research approach most suitable and follows the line of thought of an interpretive research paradigm, which is based on the understanding that one's perception of a phenomenon is subject to a range of influencing factors within an organisation. It is contingent upon factors such as internal relations, organisational politics, personal experiences, and organisational culture (Sveningsson & Alvesson, 2016). Therefore, we are particularly interested in how individual experiences connect to the larger whole (Prasad, 2018). As our research question is centred around 'understanding', we follow the key point of the hermeneutics tradition that a part can only be understood from the whole, and the whole only from the parts (Alvesson & Sköldbberg, 2017). Thus, we engaged in observations and documents studies to contextualise the outcomes of our interviews. Through a dialogue with our material, we flow back and forth between our previous understanding of agile, and new understanding derived from our empirical material, and we progressively deepen our comprehension of this managerial concept (Alvesson & Sköldbberg, 2017).

As interpretive researchers, we are in many ways inseparable from the research outcome since we make sense of the collected data through our own glasses. Hence, “knowledge cannot be separated from the knower” (Steedman, 1991 cited in Alvesson & Sköldbberg, 2017 p.1). We are aware that these glasses are coloured by our theoretical preconceptions about the fields of organisational change, organisational culture, ways of organising work, and our understanding of the world at large. This, combined with the fact that we are studying “products of the human mind” (Smith & Heshusius, 1986, p.5), make us refrain from claiming to present findings that are objective and impartial. Instead, the findings and conclusions yielded from this study are constructions of our interpretations (Prasad, 2018).

To theorise our findings, we engage in abduction. An abductive approach is argued to be most suitable for our case-based research process, and in line with the hermeneutic approach, since it starts from the empirical material but subsequently alternates between this and the theoretical preunderstandings (Alvesson & Sköldbberg, 2017).

### **3.2 Data Collection**

In this paper, a case was studied to provide answers to our research question. Ultimately, the answer to the research question is the same as the answer to the question of “what is this case a case of?” (Flyvbjerg, 2006, p.238). As our aim is to gain insight into people’s sense making of agile after an organisational change process from a more bureaucratic structure, we need to get access to in-depth empirical material. To achieve this, a case study lends itself particularly well as a method of inquiry (Flyvbjerg, 2006).

The study was performed in one of Scandinavia’s largest banks under the pseudonym of ‘Piggy Bank’. There are several reasons for conducting the study in this organisation, but there are perhaps two which stand out. Firstly, the organisation used to be structured in a highly traditional manner as a hierarchical bureaucracy. This provides a considerable disparity with the agile way of working that the organisation currently aims for. Hence, it is appealing to conduct the study in this organisation due to the substantial transition it has been, and still is going through. Secondly, the banking industry in which Piggy Bank is operating, is an industry with high demands in terms of regulations, and is known for its strong emphasis on aspects such as budgeting and government compliance. These

characteristics are contradictory to the fundamental elements of agile, and we therefore argue that this makes the case relevant for our study.

### Semi-Structured Interviews

Since the aim of our study is to gain insight into how employees make sense of the transition to agile, in-depth interviews are arguably the most relevant source of data. Interviews were semi-structured, which allowed some directionality, yet left ample room to explore and adapt to the interviewees' sensemaking of their lifeworlds and more specifically their work situation (Kvale & Brinkmann, 2009). Since the quality of our study is largely depending on the extent to which we gain insight into our interviewees' perspectives, our contact person was provided some interviewee requirements, of which our main request was to interview people from across the hierarchy to increase the likeliness of revealing possible hidden power relations.

Consequently, we conducted two rounds of face-to-face interviews with a total of fourteen interviewees. The interviews lasted on average about one hour and were recorded with the interviewees' permission. In the first round we interviewed eight people from the managerial level. Some of these were senior managers, whilst others worked as middle managers. Subsequently, a second round of interviews was carried out with six people from various agile teams. Conducting the interviews in two rounds allowed us to do a brief analysis after the first round, which enabled us to dig deeper into interesting topics during the second round of interviews, providing more depth and hence more interesting results.

Another way of increasing the richness of interview material, was to make the interviews into acts of observation. As is widely acknowledged, nonverbal communication often says more about how a person is feeling than what he or she expresses verbally (e.g. Knapp, Hall & Horgan, 2013). Thus, we were sensitive to details by not only paying close attention to what the interviewees said, but also how they said it.

Since the focus of this study is on individual experiences and feelings that might deviate from the message that the organisation as a whole intends to spread externally, anonymity and confidentiality was laid out for the interviewees at the beginning of each interview to encourage unstrained conversations. In this way, we could increase the likelihood of fostering genuine representations of our participants' perspectives (Alvesson &

Sköldberg, 2018). Firstly, we anonymised names and randomised gender. Secondly, department and team names have been omitted, and the interviewees' official titles have been generalised.

### Observations

As we appreciate the fact that speech, meaning, and behaviour do not always match (Sveningsson & Alvesson, 2016), we observed 'stand-up meetings', a 15 minute daily meeting important in many agile frameworks, in order to put our interviewees' talk into perspective and experience how such meetings unfold to broaden our understanding of agile in Piggy Bank. Furthermore, we spent a total of four full days at the bank's headquarter, which was of significant importance for us as external researchers to understand the context of our case. Our contact person guided us through several departments and provided us with multiple presentations about the organisation and their vision regarding the agile way of working. This is in line with what Schein (2017) argues, that when studying 'soft aspects' such as culture and meaning, it is of vital importance for researchers to get as close as possible to the subject of study. Therefore, observations provided us with invaluable context of the culture, within the limited time available for this study.

### Document Analysis

Additionally, complementary data was gathered through document analysis. This offered important insights into the organisational context and provided inspiration for more focused interview questions (Bowen, 2009). Moreover, by combining the discussed three methods we achieved a triangulation of our analysis which helped to build a holistic understanding of the various voices in the organisation (Denzin, 1970). In accordance with our hermeneutic approach, annual reports were analysed in order to detect expressions of change and the agile way of working connected to the larger whole of the organisation. The analysed documents are annual reports from 2008 to 2017, covering the pre-agile period up to the most recent report. Moreover, multiple documents addressed to employees as guides to the transformation were analysed to gain insight into how top management desired to communicate agile and how momentum for change was created.

### **3.3 Critical Considerations**

One important thing to bear in mind when drawing conclusions from the interview material is that the interviewees were selected by our contact person, an ‘Agile Leader’. Consequently, it is necessary to be conscious of the fact that the interviewees might consist of a group of favoured and highly motivated people. Hence, we were vigilant to ‘too-good-to-be-true’ stories of agile protégés. Nevertheless, there is little in our data that indicates any of these tendencies.

Another consideration for the study was elegantly pointed out by Frost, Moore, Louis, Lundberg, and Martin (1985). They highlight that revealing unconscious assumptions to the organisational members involves some risk. If organisational members are perfectly happy with the current state it is easy to imagine the detrimental effects that scrutinising, and possibly criticising, their cultural foundation can have, potentially disturbing or destroying the culture in question. This risk and ethical challenge was an important factor in the execution and the presentation of this study. Moreover, since we talk to employees about a change process, and therefore inevitably make comparisons between past, present, and future in our dialogue, it is important to show awareness of the possible role that nostalgia may play (Wolfram, 2001). Especially in our case of a radical transition involving cultural changes, we were attentive to references of romanticisation or demonisation towards a certain phase (Gabriel, 1993). For instance, our study uncovered some sentimentality for the distant past when Piggy Bank was still a relatively small organisation, in which collaboration and communication were better than at present state.

### **3.4 Data Analysis**

After having gathered all primary and secondary data, we transcribed the interviews and categorised our notes of observations and peculiarities to ease the analysis. However, in practice this analytical process already started during interviewing and transcribing. That is, during interviews, notes were taken of topics discussed that seemed worthy to look deeper into, and during the transcription potentially interesting excerpts were highlighted. Hence, even though we elaborate on steps taken during our data analysis, we acknowledge that research is not a linear and step-by-step process, but rather iterative and messy (Styhre, 2013). Since agile is closely related to the concept of culture and this can be perceived as



rather complex, the previously discussed cultural model by Schein (1985) also provided important guidance for the analysis.

To deal with the large amounts of data, it is arguably wise to adopt a strategy to be able to eventually draw conclusions from the collected empirical material. Rennstam and Wästerfors (2015) divide the process of qualitative analysis into sorting, reducing, and arguing. These three phases will be elaborated upon here and were used as guidance in the complex process of theorising.

### Sorting

Sorting can be understood as getting 'intimate' with the data, meaning that one shall get familiar with the material by reading it repeatedly and categorise it (Rennstam & Wästerfors, 2015). We started by browsing through the transcripts as a whole, and took notes of our first impressions. Then, transcripts were carefully read, line by line. By being attentive to topics that were repeatedly emphasised, that we found remarkable, that interviewees stressed as important, or connections to the academic literature, we were able to detect overarching themes and labelled them accordingly. This process is called coding or indexing, and is largely depending on the interpretative skills of the researcher. Coding is about conceptualising data, in which the researcher moves from a concrete level to an abstract level, and can therefore be regarded as a rather creative process (Rennstam & Wästerfors, 2015). We utilised the computer program NVivo for supporting this process productively and efficiently.

The interviews were initially coded by using 'in vivo' coding (Strauss, 1987), which means that we used interviewees' own vocabulary to label our data. For example, by using labels as 'big tanker' and 'one size does not fit all', we stayed close to the interviewees' point of view, as these were the exact words they used. Some of these labels are drawn upon later in this paper as metaphors to describe overarching themes.

## Reducing

The next step was to create more abstract labels by electing the most valuable codes and categorise these by bringing codes together. We did this by combining certain codes into new ones and eliminating several of the initial codes. Finally, codes could be grouped into themes by deciding which ones were the most relevant and how they were related. This enabled the description and explanation found in the next chapter. Also, in this phase we moved from individual coding to a negotiated code structure, that included the perspectives of both researchers. What was helpful in increasing the richness of this process was that both researchers come from different backgrounds and therefore brought different lenses to the analysis.

It is also important to highlight that the decision of what is relevant is a largely subconscious process in the mind of the researcher, since relevance in this case does not mean the categories that occur most frequently, but instead are the most interesting. And how does a researcher decide what is interesting? Weick (1989) calls this process ‘disciplined imagination’ and rejects the common idea that the process from data to theory can be reduced to the mechanic steps it is often portrayed to consist of. Instead, descriptions of theory building should acknowledge and appreciate the “intuitive, blind, wasteful, serendipitous, creative quality of the process” (Weick, 1989, p.519). For instance, in our study we observed repeated talk about companies with startup mentalities with underlying positive connotations directly related to the topic of agile. This created the impression of an idealisation of startups in the organisational discourse induced by the introduction of agile. Our interpretation of this is that the introduction of agile methodologies fosters innate feelings of envying the startups for their flexibility and agility, and feelings of not being ‘good enough’.

## Arguing

Arguing in the theorisation process is about creating an independent position in relation to authorities, and hence, establishing a concept that represents the findings (Rennstam & Wästerfors, 2015). In our case, we argue for three concepts, or alternative understandings of agile, namely ‘agile as an envy generator’, ‘agile as standardisation’, and ‘agile as managerial boredom’, all of which will be elaborated upon in the discussion. Our concepts were

broadened by explicitly focussing on coupling our results to existing theories, concepts, and models to increase theoretical relevance.

The above framework of sorting-reducing-arguing provided navigation in the process of going from 'raw' empirical material to interpreted findings. In the following chapter we will present the outcomes of the sorting and reducing phase, which will be followed by the discussion in which we argue what our case is a case of.

## 4 Analysis

*Whenever the agile coaches came with all their classes and trainings, showing all these fancy Youtube-videos in which everything is great. You see flowers and glossy pictures and everything is just flowing. I mean, the idea is good, but we're in a complex reality. [...] So everything is not a green path. Things happen when we're in a live reality.*

Maja, a Scrum Master and software developer with several years of experience in Piggy Bank, had been sitting on some frustrations for a while. Frustrations about the glossy image that the top management and their agile preachers were painting of the bank's new way of working. By sharing these frustrations, she also highlighted a discrepancy between the management's expectations and the operational reality, a commonality between our three main findings in our study of agile in Piggy Bank.

This chapter presents these findings which are outcomes of our interpretations of the agile adoption and outcomes of this process. We draw upon quotes from interviews, excerpts from documents, and contextualise with observations. The first phenomenon was uncovered in the general organisational discourse which *idealises startups*. Another expression of this clash is the *scattered outcome* of the transition that stands in stark contrast with top management's ambition of 'One Piggy Bank' and the perceived expectation of a uniform way of working throughout the organisation. Moreover, the clash between expectations and reality is also exemplified by the *new managerial reality* we observed, in which this reality consisting of middle management's boredom, clashes with top management's underlying assumption of middle managers being enthusiastic agile recipients of agile. Overall, we believe that agile in Piggy Bank is a case of a fantasy project.

### 4.1 The Case

Before we present our findings, we will first introduce the case. This case description is based on official documents about the transition to agile, annual reports, desk research, and presentations given by our contact person, Martina.

Piggy Bank's roots can be traced back for more than a century, and the bank employs a five-digit number of employees. It serves both corporate and private customers, and is among the leading players in all its markets. Piggy Bank has an in-house IT department with more than 1,000 employees which both develops and maintains all of the bank's front-end and back-end systems.

Through our analysis of the annual reports of the last decade, we observed that both general technology trends and the IT department have progressively been receiving attention in these reports, which can be interpreted as a mirror of the importance of IT among top management. This is illustrated in how Piggy Bank develops from having 'IT expenditures' to making 'IT investments', and how IT from 2016 and onwards was entitled a dedicated box in the organisational chart, as opposed to having to share a box with support functions such as HR and Legal. In her presentation, Martina illustrates this growing role of IT by saying:

*Piggy Bank is more like a technology company with a banking license.*

Moreover, Martina emphasised that nowadays 97% of all customer interactions within Piggy Bank occur digitally. In a document about its future ambitions, it was stated that current focus areas to "accelerate the transformation to become more digital and data driven" are hackathons, artificial intelligence, and blockchain, amongst other things. This further highlights the current and future importance of technology in the bank.

Even though the agile transformation within Piggy Bank was officially initiated in 2013, the first trace of agile is found already in the annual report from 2012, where the responsible director states that "we [have] laid the foundation for so-called agile development". It is also emphasised that the transition to agile is meant to be gradual, and it is not until the report for 2016 that the attention on agile takes off. It is then reported that 2,000 employees have participated in "individually adapted agile training courses". Furthermore, in the most recent annual report, agile reaches the milestone of being mentioned in the introductory letter from the CEO of Piggy Bank.

The goal to become a faster and more flexible organisation was officially the main reason for transitioning to agile. According to official documents, this goal was created

through the need to deal with ‘new technology’, ‘changing customer behaviour’, ‘regulations’, and ‘to deliver world-class service to customers’. Nevertheless, there are two less bespoken reasons for moving to agile. The most immediate of the two stemmed from a traditional IT project which fell apart only six months before introducing agile. This project, referred to as Project Goliath in this paper, was described as a fiasco in the news media, and costed the bank enormous amounts of money. Project Goliath was organised and managed based on a development process called Rational Unified Process (RUP) which had been implemented at Piggy Bank by consultants in the mid-2000s. In RUP, a lot of resources are invested in an early phase to specify all the requirements before any development takes place. It was with this dark backdrop that the realisation of a need for a new way of working emerged within Piggy Bank, which led to the introduction of agile rapidly thereafter. As opposed to RUP, an agile approach meant dividing the development process into smaller deliveries with the aim of reducing risk and establishing a closer collaboration with clients.

Another reason for moving to agile was the increasing ‘threat’ of FinTechs for the banking industry. FinTechs are financial technology startups that disrupt the industry with innovations and novel solutions in the areas in which the traditional banks operate. Common for these companies is their lack of bureaucracy and the widespread use of agile methodologies (Mackenzie, 2015). Through their ability to respond swiftly to changes in the environment, they bypass large and cumbersome organisations like Piggy Bank. Hence, they seize opportunities before Piggy Bank is even aware of them.

The agile methodology these startup companies tend to adhere to is either Scrum or Scrum inspired (Papatheocharous & Andreou, 2014). This is also the case for Piggy Bank, and thus, an understanding of Scrum is important both to gain insight into the elements people often relate to agile, but also to fully comprehend the case study presented in this paper.

The details of Scrum are laid out in *The Scrum Guide* (Schwaber & Sutherland, 2017). The team forms the backbone of Scrum, and should be both ‘cross-functional’ and ‘self-organised’. This means that they should not be dependent on external resources and that they should be able to choose how to solve tasks themselves. The ‘Scrum Master’ and the ‘Product Owner’ also play important roles. The former is there to support the team through acting as a ‘servant leader’, and the latter is responsible for maximising value through prioritising product features. Moreover, it is important that the process is transparent and

visible for all the stakeholders. This is achieved through a set of regular meetings, most notably the fifteen minutes daily ‘stand-up’ meeting where all team members briefly share what they have done since the last stand-up, and will do until the next. Two other facets of agile that are not a part of Scrum, yet often used in combination with it, are the so called ‘Tribe’ and ‘Squads’, first introduced at Spotify. A Tribe is a collection of Squads, also known as teams, that share space in a common area. This structure has gained rapid popularity in organisations aspiring to be agile, of which Piggy Bank is an example (Betica Technology Solutions, 2016).

As we now have introduced the case, we will continue by presenting our interpretations of our empirical material. As mentioned above, we will present three main findings, which share the similarity of an overarching discrepancy between top management’s expectations and the operational reality.

## **4.2 The Idealisation of Startups**

One of the findings that became evident through the interactions with Piggy Bank employees, was how warmly they talked about organisations with a *startup mentality*, such as FinTechs and perhaps most notable, Spotify. Even though it is the mentality they share, we refer to this as the idealisation of startups for simplicity.

This startup mentality entails an organisation tailored for making swift changes and decisions through flat structures with little bureaucracy, and often involving an agile framework like Scrum. Piggy Bank is a well-established and honourable bank with an impressive history, and one could believe that employees and management were proud carriers of the legacies and traditions that have led them to their current position. Paradoxically, this was not the case. We refer to this phenomenon as the ‘idealisation of startups’, and there seems to be a close link between this idealisation of startups and the clash of expectations and reality. What happens if you dream about being a jet ski but realise that you are still a big tanker when you wake up?

## The Big Tanker

Despite the many positive aspects of being a large company, employees tended to focus on the negative aspects related to being slow and outdated. For instance, Hanna, an agile team member, highlights that during her studies in the early 2000s, she and her fellow students were all developing software using the agile framework known as Extreme Programming:

*But then I came out into the real life and realised people haven't really started catching on yet. And then I came here [Piggy Bank], and it was like going back another few years in time. You know, large organisations are usually the last to adopt things.*

This quote highlights the attitude most of our interviewees had towards large organisations such as their own employer. Fabian, a middle manager in the IT department and an important and influential advocate of agile, also emphasised that:

*Banking is generally not in front leading the change.*

Thus, there appears to be a widespread scepticism regarding the ability of how and if a large organisation in general, and a bank in particular, can make swift transitions. This also points to the long journey it is for a traditional organisation like Piggy Bank to become agile and brings forward the question of the aforementioned cultural compatibility. However, our interviewees were overall fairly enthusiastic about agile. Jasmin is a senior manager on the 'business side' of Piggy Bank and works with designing digital products for consumers. She has a more balanced view of being large, and emphasises that:

*It takes time to change a 'big tanker' [like Piggy Bank], but if you manage to do that, there will be a lot of power going in the same direction.*



The metaphor of ‘big tanker’ is interesting and illustrative for Piggy Bank. Tanker ships are everything but agile, yet they have other advantages. Still, being a ‘big tanker’ whilst trying to become agile illustrates much of the frustration that the interviewees shared about large organisations. Yet, by being a late and slow adopter you are more likely to avoid by-passing fads and only invest time in practices with a proven efficacy. Furthermore, by not embracing everything suggested by management consultants, employees are provided stability to focus on their daily work instead of constantly having to adopt their way of working. However, these positive consequences of being a large player in an old-fashioned industry were downplayed to a large extent.

### The Jet Ski Fantasy

The negative connotation attached to large organisations goes hand in hand with a seemingly rosy picture of organisations with a startup mentality. In one way interviewees idealise what they are not by being critical about what they are, but this assumption is also manifested through explicit praise of startups. Throughout our interviews and the most recent annual reports there were a number of references to how FinTechs are operated. Another organisation which receives a lot of attention from our interviewees is Spotify.

This romanticisation of startups was demonstrated by a majority of our interviewees. For example, in his tirade about the complicated, bureaucratic structure at Piggy Bank, Rudolf, a middle manager in IT, seems to fantasise about how working life would be if Piggy Bank looked more like Spotify or a ‘new startup’:

*If you have the right prerequisites, like Spotify or new startups; they have one platform, [and only] a few different functions.*

Jasmin is also comparing her image of Spotify and FinTechs with her organisational reality:

*We have tried the Spotify way of working,*

and that:

*The smaller FinTech companies are not divided in 'Business' and 'IT'.*

The division between the 'business side' and the 'IT side' was highlighted by many interviewees as a big issue in Piggy Bank, and is therefore an aspect we elaborate on in a later section. In the previous excerpt, Jasmin expresses envy related to the way of working in FinTechs. Maja also relates to this by mentioning another organisation with a startup mentality:

*In Spotify they may have a lot of young and hungry people, probably JAVA-developers with a similar mindset. Here there is a mixture of coding languages and age, and a lot of people. That's the tricky part.*

Alfred, another middle manager within IT, seems to find the whole 'buzz' around Spotify slightly exaggerated and expresses this by sarcastically imitating the organisational discourse on this topic:

*The Tribes are a really hot topic within this bank right now. "Put every development team into a Tribe because that's what Spotify does, so if they do it, it must be great".*

This idealisation can be a result of several factors. One is of course the aforementioned assumption that being large is negative in the domain in question. Another potential reason is the immense attention that the success stories of Spotify and multiple FinTech companies receive. For Piggy Banks in particular, FinTechs act as disruptors in the market of financial services. In the annual report of 2017, Piggy Bank wrote that:

*Owing to the rapid development, mature universal banks are encountering competition from FinTech companies.*

Generally, these startup environments are viewed as delivering higher rates of innovation and having better flexibility than traditional organisations. Therefore, the idealisation of startups can perhaps be seen as an artefact of Piggy Bank valuing both innovation and flexibility. It is then perhaps no surprise that Piggy Bank and many other banks look at these successful startups for inspiration. There is a belief that innovation is key in combating the new market entrants. This is also revealed in the organisation-wide initiative in Piggy Bank where any employee can pitch their ideas for a board with the possibility of getting 20% of their work time allocated to developing that idea.

The idealisation of startups we observed at Piggy Bank has in many ways led to the adoption of a way of working which is considered to be a very good fit for startups. The question of how well agile fits in a large and traditional company like Piggy Bank is not as clear. What is clear is the discrepancy between the desire to be like a startup and the reality of being a large, traditional, and well-established bank.

### The Advantages of Buzzwords

Agile, as it is known in the idealised companies, seems to be taken out of its context through the success of these companies. A result of agile being in vogue is that Piggy Bank tries to be something that it is quite clearly not. Fabian illustrates the sarcasm this generates within the organisation:

*I think it's the same thing with everything that's glitter and shine. It sounds good, but obviously some people have been here a very long time, and they've seen. If it's called agile, or something else, they've seen it come and go. For them it's like "oh, here's another fun word to work with".*

Agile is associated here to ‘everything that’s glitter and shine’, relating it directly to fashion. The ‘fun word’ can be perceived as a synonym for a buzzword. Even if the transition to agile at Piggy Bank was driven by fashion, turning agile into ‘another fun word’ does not necessarily imply that it is something negative. Several managers we talked to emphasised that they considered various ways of working to return every now and then with different names. Rudolf explains:

*When you focus on being good at ‘this’, then you lose some of the other capabilities. It’s a trade-off. Right now we focus on flexibility and to chunk bigger things into smaller ones, but if you go ten years back, we were more focussed on “OK, you’re responsible for ‘this’, and you should secure that we have the capability to deliver ‘this’.”*

In this excerpt, Rudolf highlights a cycle-like process in which supposedly new organisational concepts appear and are adopted in a fashion-like manner. Gustav, a senior manager in IT at Piggy Bank, explained that agile was considered already in the mid-2000s, however it was scrapped in favour of RUP. It was only adopted once it really had become in vogue, a fashion triggered by the success of FinTechs and Spotify. However, an alternative view is offered by Henrik, a senior manager at Piggy Bank. While fashions and buzzwords are often considered as something negative, he adopts a more positive perspective. He states that:

*Sometimes you need to change the way we look at things [...] to make sure we focus on the things we haven’t focussed on.*

And continues:

*Buzzwords can be good because we need to talk about these things, and in that way we get a dialogue about them. So then we can start talking in the same language.*

In other words, Henrik thinks that buzzwords and management fashions play important roles in the running of organisations. He believes that fashions contribute to the managerial agenda and act as reminders of different organisational aspects. For instance, agile is all about collaboration and communication. As the excerpt from Rudolf highlighted, the focus in Piggy Bank for the past decade has been on individual responsibility, the opposite of the shared responsibility central in agile. As Henrik illustrates, fashions make you consider whether the existing focus is correct, or whether the focus on, for instance individual responsibility, is too one-sided. In other words, fashions have the potential to become an enabler of more nuanced managerial practices. That said, Henrik emphasises that this is not always the case by using the words ‘sometimes’ and ‘can be’. Fashions and buzzwords need to be critically assessed as often they may turn out to be fads.

### **4.3 A Scattered Project**

The second, and perhaps the most evident finding at Piggy Bank was what we have termed a ‘scattered project’. As a result of the idealisation of startups, the employees at Piggy Bank perceived the management to have an aspiration for a uniform and agile way of working in the bank that should resemble that of startups. However, this is an aspiration decoupled from the organisational reality, where we observed both a multitude of adaptations and understandings of agile as a concept, along with a ‘Chinese wall’ separating the ‘business side’ from the ‘IT side’. Several interviewees emphasised that despite the top-management’s ambition for unity, ‘one size does not fit all’, and interviewees requested more respect and acknowledgment of the value of having different ways of working. Additionally, there also seems to be a divergence in the experienced effects of agile.

#### The Ambiguity of Agile

The first dispersion encountered started with the very essential meaning of the word agile. We interpreted this as agile being a rather ambiguous concept at Piggy Bank, considering the broad range of meanings that members of Piggy Bank attached to it. Whereas some viewed agile as a toolbox, others approached it in a more holistic way by viewing it as a ‘mindset thing’. For example, Alfred sees agile as a tool:

*The classic thing when you say what the agile way of working is, is a whiteboard with post-its on.*

Alfred emphasises one aspect of the Scrum methodology, one of the methods that falls under the umbrella term of agile. During the interviews, it became evident that Scrum is perceived to be the ‘real’ agile and other agile methods like Kanban were considered to be ‘less’ or ‘fake’ agile. Maja exemplifies this:

*We did semi-agile or something like that. We had the board meetings, maybe we were Kanban-style perhaps?*

The above highlights the confusion among interviewees about what agile is truly about. It seems that there is lack of shared understanding. In contrast to the above statements where agile is approached in a somewhat practical manner, Henrik, perceives the concept in a broader context:

*Agile for me is very much common sense. If you want something to be good you have to be close. If you want to feel engaged, you need to understand why you are doing something. I think that is the biggest and most important part of the whole agile way of working. Then you can use a lot of tools and meeting formats and Scrum or whatever you want to use, that is kind of not very interesting from my point of view. The most important one is the mindset and the thinking.*

The saying that agile is ‘common sense’ occurred regularly during the interviews. When something is common sense, how can it then be so difficult to implement? For instance, Maja seems to be rather confused by the concept of agile, even though her title as ‘Scrum Master’ suggests that she is an expert in the topic:

*For me it's hard to say that "we are agile". Where do you draw the line? Are you agile if you do all the things, or are you still agile if you adapt some of it?*

The different views on what agile exactly means are striking, since the official voice of Piggy Bank, also referred to as the 'propaganda machine' by Nicole, a product owner, stretches the importance of developing a shared understanding and shared goals in order to manage the change process successfully. The fact that Nicole used the strong metaphor of 'propaganda machine', possibly indicates that she experiences that top management wants to promote a unified meaning of agile as a panacea to the rest of the organisation.

### One Size Does Not Fit All

Piggy Bank's 'propaganda machine' also preaches a way of implementing agile that fits with 'Piggy Bank's culture' in a common pursuit to delivering full value to customers and stakeholders in the best way. By advocating this, top management sends a signal that there is such a thing as *one* Piggy Bank culture, whilst all of our interviewees seemed notably sceptical towards this claim. Maja captures this scepticism well in the following excerpt:

*That's the tricky part. How do you apply this generic rule set on each of these teams that are completely different?*

Alfred elaborates:

*What I realised is that this is not one company. This is like 200 small companies trying to collaborate as well as possible. We strive to be one company, I guess it's a good thing.*

The sarcastic tone of voice used when saying “I guess it’s a good thing” suggests that Alfred was doubtful about whether the strive for cohesion is truly a good thing. Furthermore, the reference to ‘200 small companies’ indicates the existence of subcultures within the organisation, rather than top management’s claim of ‘one Piggy Bank’. Tim, who is an agile team member, also responded with a slight sense of despair when talking about the possibility for agile as one package to become a success at Piggy Bank:

*Yeah... ‘One’ Piggy Bank, Piggy Bank Go [the internal change consultants] and so on. We have... Well, failed is not the right word, but you can’t change a culture by just giving someone a book to follow.*

Here the ‘generic rule set’ and ‘a book’ can presumably be understood as the Change Handbook that Piggy Bank distributed to its managers, change agents and other facilitators and advisors involved in the change process. Models, formulas and tools are elaborately described in this guide, acknowledging the difficulty to change and the importance of the ‘people factor’ in change. Nevertheless, it is seemingly made sense of by interviewees as forced upon them, and hence, the Handbook becomes an artefact of a ‘forced’ top-down implementation through the negative connotation that interviewees attach to it. It is remarkable to encounter that interviewees feel a certain pressure from ‘higher up in the chain’ to implement the ‘real agile’ or ‘agile by the book’, whilst the official voice of Piggy Bank claims to be open for adjustments. In the following excerpt from an interview with Maja, we were talking about the expectations around cross-functionality, that every team member shall be able to pick up any task - in the mission to become self-organised teams. Maja illustrates the frustration that is felt amongst interviewees concerning these expressed expectations from top management.

*“Take whatever you want, and help each other!” Yeah... but this area is completely different from that area. It’s not even the same language in the areas, and the setups are completely different. In our reality, it’s not as easy.*



Despite the above expressions of scepticism towards the manageability of this change and Piggy Bank's culture, most interviewees appeared to be compliant through the fact that they still 'embraced' agile, at least to the extent that they worked with it in some way or the other. This is exemplified by Hanna, when asking about how she experienced the agile way of working:

*I've grown accustomed to it, so I would say I'm pretty OK with it now.*

Noted here though is that this is not a surprising fact since the majority of interviewees were selected by our contact person. Even though interviewees feel pressured to implement agile as 'one package', this is not what top management explicitly communicated via their official voice according to Gustav:

*And that was explicitly said, "we are going to introduce agile in an agile way". And I think that's a good story. "It's not going to be pushed on you", and "you don't have to be ready by a certain date."*

This quote stands in stark contrast with the general discourse on this topic during the interviews. Even a senior manager like Henrik is leery towards the above claims:

*We are always trying to find the best solution for the whole bank, but one size does not fit all.*

Despite the fact that top management stated that the implementation of agile would be done in 'an agile way', even a senior manager like Henrik shares the impression that they really are trying to craft a uniform size for the bank as a whole. However, also from his perspective he acknowledges the diversity between teams, and their need for tailored ways of working. Fabian also agrees that 'one size does not fit all'. Hence, he is convinced that there

have to be certain modifications to the concept of agile in order to make it ‘workable’ at Piggy Bank. After mentioning jokingly that we should not tell it to the agile coaches, Fabian admitted:

*Sometimes I feel like it's like taking a round ball and trying to put it in a square, because we are very square here, and agile is the round ball. So we're trying to tweak the ball a little bit.*

Although Fabian asked us to not inform the agile coaches about the fact that his department is ‘cutting some edges’ from the agile concept in a light-hearted way, the fact that he said it still implies that apparently agile coaches *don't* want edges to be cut or compromises made in the agile methodologies offered. In the end, the edges that were cut off the ball were those regarding self-organising and autonomy.

Overall, the previous excerpts show the contradiction between Piggy Bank’s official voice about the implementation of agile and the way interviewees experienced the expectations of top management. There seems to be an ignorance or insensitivity from ‘higher up’ towards the existing subcultures within the organisation.

### The Chinese Wall

Besides the acknowledgement by interviewees about the of presence of subcultures between teams, the most omnipresent carve seems to be between ‘business’ and ‘IT’. It promptly became clear during the interviews that these two parts are perceived to be two different companies, or as Tim describes it:

*It's two different languages, it's two different worlds.*

As the attentive reader might have noticed, we have been referring to this phenomenon throughout this analysis by using the word ‘side’. This stems from the language

used by our interviewees, since when asked about their role, they started by saying ‘so I’m on the business/IT side’. The fact that the word ‘side’ was used consistently in this context indicates an overall assumption that there is a clear division between ‘IT’ and ‘business’. Moreover, whilst the wall between ‘IT’ and ‘business’ is a metaphor, the difference between these two ‘worlds’ are visual as well. Fabian states:

*And I mean, that was one of the most interesting parts when I first moved here [IT], we have the software developers, I’m stereotyping now, but with jeans and t-shirts and headphones, and they want to sit and not be disturbed, and then we have the product owners and the business people, and they’re like “wow, let’s celebrate”. And the developers were saying “they’re crazy, they’re not working”, while the business people were like; “who are these boring, grey people?”*

In line with Fabian’s description about optical differences between IT and business, our observations also encountered some clear dissimilarities. The most apparent one was the way people were dressed. The business people we spoke to and observed were all dressed in business attire, whilst the developers were wearing slippers with woolen socks and a t-shirt of their favourite band.

Furthermore, having ‘walls’ between business and IT is reflected in the agile transition being a rather scattered project. This becomes even more evident when interviewees address the issue explicitly, like Fabian does in the following excerpt:

*The IT box of Piggy Bank is more agile, we are trying to work more agile, and the ‘business side’ is not really there. And obviously you’re thinking “okay, but you can’t be agile without the ‘business side’”, exactly. So that’s why we are kind of limping. The one leg is trying to run, and the other leg isn’t really there.*

Fabian shows here that Piggy Bank is facing difficulties because of the fact that the transition to agile is not moving in the same pace in the different parts of the organisation. Or as Henrik says it:

*Because we should have, as soon as we talked about working agile, tried to get the 'business side' along, so they would have been part of the journey. Now we are ahead, on the 'IT side', and the business is trying to figure out what happened.*

Henrik highlights the struggle of bringing the 'business side' up to the same speed as the 'IT side'. Yet, as Nicole shows below, even if the Chinese wall between the 'business side' and the 'IT side' would get torn down, there would still be a Chinese wall between the top management and the rest of the organisation.

*Even if you have a 'business side' that's agile, you're going to still have a top management that is, I think, not working agile. They're going to be very traditional in how they do all of that.*

### The Perceived Effects

The case of a scattered projects was also encountered when discussing the effects that interviewees perceive that an agile way of working has on the organisation. Although Piggy Bank seems to be in the middle of the process of transitioning to an agile way of working, agile has already had some notable effects in the eyes of some of our interviewees. For instance, Fabian sees improvements in collaboration between different kinds of people and the open-mindedness within Piggy Bank:

*I feel that it's more tolerant with different kinds of people. Extroverts and introverts. I feel that by working agile, both types get a say in the room, that's why I think it's*

*better to work this way. Because you get most effect out of most people, compared to how it was before.*

The increase in collaboration is perceived as pleasant and fun, yet also brings certain pressures according to Jasmin, who works on the ‘business side’:

*I find it much more fun to work more closely now with the colleagues from IT. But I also have colleagues that are frightened about working closely with IT, because it's an area that they don't have knowledge about.*

Jasmin points again at how different the lifeworlds in business and IT are, and that an increase in collaboration can therefore be experienced as frightening. Gustav also acknowledges possible tensions that come along with this intensified collaboration:

*We are trying to move to a Tribe structure where we have daily collaboration with the business. That would probably increase resistance as well, I think. Because it's a transparency issue. If you haven't come to the point where you enjoy telling people about your successes and failures and exactly what you're doing, then you're definitely not going to think that it's a good idea to expose yourself to people you don't know.*

This implies a desire from the change initiators, the top management, to deploy a model that was designed for a different company in a different industry in Piggy Bank. Gustav thinks this is likely to cause resistance, which can be related to the aforementioned ‘ball in a square’ comparison that Fabian made. By referring to things as ‘talking about failure’ and ‘exposing yourself’, Gustav points at cultural artefacts that feel rather unfamiliar and uncomfortable to the culture he is used to. The previous excerpt, combined with the general interpretations from the interviews show that whilst structural change seems achievable, cultural change appears very difficult. Even though difficulties are acknowledged

by top management in the official voice, there is still an assumed manageability of culture, which is exemplified in the following excerpt from the Change Handbook:

*In the end it is a question of what kind of culture do you as a leader want to create; a committed or a compliant one?*

Even though the question is whether leaders want to create a committed or compliant culture, the question that arise from this is how Piggy Bank can assume that the leaders themselves are committed and not compliant? As we observed mostly compliance during the interviews, which will be emphasised on in the section about the marginalisation of middle managers, it feels like there is an unquestioned assumption that people from management level and up are automatically committed or engaged in the change initiative. But who guarantees that? How can compliant leaders ‘make’ their subordinates committed, if making anyone committed is possible at all?

In order to make an agile way of working possible, collaboration and communication are important. As discussed, these are aspects of organisational life that need some improvement at Piggy Bank. Presently, the bank tries to improve these aspects and aspires to break down the previously discussed walls, since reaching its goals, increased customer orientation and improved value for stakeholders, requires ‘cross-functional collaboration’ according to top management. When asking Tim about his thoughts on communication between the two supposedly different sides of the organisation, he was positive about the improvements, yet emphasised that it depends on the individual:

*It’s a big bank... And you have a great Chinese wall sometimes between business and IT. Sometimes it’s difficult to work with them [on the business side], sometimes it’s easier. It really depends the individual I have to say. And I think that’s something, actually we’re proud of that; we broke this wall. Now we work together quite well. Because Piggy Bank has been trying for many years, to make business and IT work together.*

Tim finds that breaking down the walls has helped to improve communication, since *'you have a face, a personality, you're not just the email account anymore'*. Interesting here are the pronouns that Tim uses; 'we' and 'them'. By saying *'we work together quite well'*, he suggests that he experiences unity between him (IT) and business. Yet, by using 'them' in *'sometimes it's difficult to work with them'*, he unveils that he still distances himself from the 'business side'.

Overall, the 'scattered project' was one of the findings which was the most surprising for us. We believed that agility would be well-established in Piggy Bank after having initiated the agile transition five years ago. This is also the image Piggy Bank's management is painting in official publications such as the annual reports, and how the employees perceive their expectations. Yet, this is another example of the clash of the managerial expectations and what is actually happening in the organisation, and highlights how a transition from an aging bank to an agile organisation in many ways can be characterised as a slow and painful process.

#### **4.4 A New Managerial Reality**

The third and last remarkable discrepancy between the perceived expectations of top management and the true organisational reality is related to the bank's middle management. From the initial document studies that we carried out prior to the visits at Piggy Bank, it was noticeable how the bank's management took the middle managers' enthusiasm as a given. We understand this as a relatively common, yet problematic aspect of organisational change in large organisations. In Piggy Bank, internal Change Handbooks treated middle managers as 'puppets' of the top management and assumed their enthusiasm about the change initiative. However, this marginalisation of the middle managers can be detrimental, in particular when transitioning to a way of working centred around self-organising teams which is inducing a power transfer which again dramatically alters the role of middle managers. Whilst there was an expectation of enthusiasm, we found that agile produced boredom amongst some of the middle managers.

## A Shift of Power

One important aspect of agile is the focus on collaboration and the shared responsibility within self-organising teams. Yet, by allowing for more self-organised teams there is an inevitable shift of power from managers to the teams themselves. This is an aspect which has not received much attention, but which is an important side-effect of agile. Fabian states that this power shift:

*is one of the things that's really challenging. Losing power and control is obviously not something that someone desires if they don't know the effects.*

Whilst the shift of power is an important implication of the introduction of agile practices on its own, it also has important consequences for the middle managers. Fabian further elaborates on how this process unfolded for many:

*Some of them are still in the same position, but their responsibilities have changed. In one area, all the managers had to re-apply for their jobs, and some actually got their same jobs back, but with a new role. Kind of "now your job is not to be in front".*

This excerpt emphasises three aspects of this change. Firstly, it involves a rather dramatic process for middle managers. Secondly, the ironic expectation of puppet-like behaviour among middle managers. They are assumed to be enthusiastic in driving a change process which may ultimately lead to their redundancy. Thirdly, the change to agile has large implications on their roles. This was also emphasised by Rudolf:

*I would say that managers nowadays work more with removing obstacles and trying to get things flowing.*



This highlights the divergence from the previous reality where middle managers were able to practice their technical competence. It seems reasonable to assume that those who pursue managerial roles are tempted by the increased power and influence. Thus, it can be described as a paradox that those who have the most to lose from an agile transformation, middle managers, are those who have to roll out the new working practices.

### The Marginalisation of Middle Managers

The change of roles for the middle managers induced by the aforementioned power shift proved to have important implications for these managers themselves. One example of this is Donald. Donald has a background as a developer but has spent the last years in managerial positions, and is currently responsible for a small area consisting of three agile teams. He has good insights into the agile practices and seems to have had few problems of gradually handing the control and power to his teams. He even stated that the agile transformation for him felt natural. Yet, moving to agile has had an important effect on his own role which may not have been anticipated. Previous to the agile adoption, Donald was engaged in discussions of technical nature with the development teams. However, he has been gradually decoupled from the technical aspect of his job. Donald explains:

*So when everything is working I'm not doing much. So it has changed a lot. In the beginning, I was involved in every sprint planning, in every meeting, in every detail. Now I'm doing other stuff, like strategic work and I sometimes participate on the daily meetings, but I'm more of a hurdle remover if anything. [...] I spend more time on PowerPoints and talking with the management or stuff like that. So my role is different.*

And whilst many interviewees explicitly stated that it was more fun and enjoyable to work agile, Donald simply responded that for him personally:

*It's boring.*

This demonstrates one serious issue of the agile transformation. Managers who previously enjoyed spending time on technical aspects are left bored with their PowerPoint slides. It seems reasonable to assume that it is the most competent developers who are promoted to become managers in IT departments, and that these people are more intrigued by the technical challenges than the strategic challenges. As Donald puts it:

*There's a reason why we chose to work with computers.*

Hence, by changing from a more traditional way of working to an agile way of working there is a significant risk that the most competent developers end up stranded in managerial positions in which they have no longer any interest in once the technical aspects are gone. This relates to the aforementioned assumption of managerial enthusiasm, or perhaps middle managers are simply forgot due to the focus on all the elements in an agile transformation. Firstly, this seems like a waste of valuable technical expertise for the organisation. Secondly, there is a human aspect involved in this as well, as it appears almost ethically questionable to make PowerPoint the most important work tool for technology savvy managers.

### Coping with the Marginalisation

Whilst Donald found his new role in the agile organisation uninspiring and boring due to the decoupling from the technical aspects of his job, Alfred dealt with the same situation in a completely different way. Donald and Alfred have the same positions, but in two different divisions. They also share a similar background as software developers, and thus offer a case for direct comparison. The reason for this is the big difference in how they fulfil their roles. Alfred says that:

*The best thing about my job as of now is that I am able to be both a technician and a manager. Because by being that, I can be involved in discussions with the developers, even if I'm not writing that much code myself.*

But he does acknowledge that this is very unique:

*If I would search for a role like this in another company, I would probably have purely managerial role, and I would miss the part of being involved in the daily work with my colleagues.*

Instead of accepting the decoupling from the technical aspects of the role, Alfred holds onto them, as they provide important motivation and enjoyment in his job. On the one hand, this may be viewed as a positive move to prevent dissatisfaction and boredom. On the other hand, it can also be considered as selfish, as being connected to the technical aspects and problems that his teams face may prevent them from becoming self-organised. Thus, Alfred's way of coping with the middle managerial marginalisation may slow down and possibly even prevent the agile transformation that Piggy Bank attempts, despite his enthusiasm about agile, both as a concept and in the bank. One interesting question is whether Alfred is to blame, which is one of the issues that is addressed in the next chapter.

#### **4.5 Summary**

In this chapter, we presented the findings from our case by illustrating how we interpreted a clash between the perceived top management's expectations and organisational reality, and how this was expressed in multiple ways by interviewees. Below, we will summarise these expressions.

The first expression of this clash was through what we interpreted as the 'idealisation of startups'. This phenomenon entails that organisations with a startup mentality, are put on a pedestal within Piggy Bank, causing a desire to be something that they quite clearly are not and hence, a certain degree of envy towards these startups.

The second clash is described as a 'scattered project', as there is divergence between the perceived desire of top management to implement agile as 'one package' and the size, industry, subcultures, and heritage of Piggy Bank ruling out this possibility. This leads to

more frustrations among employees, since they feel pressure to realise the transition in a ‘by the book’ way, whilst reality complicates matters and makes it basically impossible.

The third clash was understood as ‘a new managerial reality’. Here there seems to be a ruling assumption that middle managers are enthusiastic about the change initiative towards agile, while it is overlooked that the closer Piggy Bank comes to being an ‘agile organisation’, the more the traditional role of the middle manager becomes marginalised due to the increasing autonomy of teams. Middle managers are therefore interpreted to be the ‘puppets’ of top management, expected to carry out a change process that leads in their case to an increase in boring work tasks that they never actively chose to do.

Overall, the assumption of managerial enthusiasm and puppetism is yet another expression of the clash of top management expectations and the organisational reality. Together with the idealisation of startups and the scattered nature of the agile project, these three key themes form the basis for further interpretations in the discussion.

## **5 Discussion**

This study was initiated out of curiosity for the ‘buzz’ around agile. The positive connotation found in the general business discourse along with the one-sided literature triggered our interest to dive into the matter and ‘demystify’ this seemingly cure-all concept through finding out what agile truly means to the people experiencing this way of working. In general, we found that most interviewees were positive about agile as a theoretical concept, but critical towards the deployment and fit in their everyday reality. Instead of un-reflexively concluding that agile is the ‘organisational panacea’ many perceive it to be, we turn to the alternative meanings that emerged from our study to contribute to a more nuanced and realistic picture of this post-bureaucratic concept. In this chapter, we present three alternative understandings of agile, namely ‘agile as an envy generator’, ‘agile as standardisation’, and ‘agile as managerial boredom’. With these meanings we do not attempt to overshadow potential positive attributes of the agile way of working, and thus, they should be considered as complementary to the established and positive meaning. By providing these perspectives, we aim to contribute to a refined understanding of agile in the literature, in particular for agile in large and hierarchical bureaucracies.

### **5.1 Agile as an Envy Generator**

Despite the fact that FinTechs and Piggy Bank are beyond comparison in nearly all domains, such as in access to financial resources, customer base, and number of employees, Piggy Bank describes FinTechs as a significant threat to both itself and the established banking industry. The rationale for this is related to the ability of organisations with a startup mentality to respond swiftly to changes in their business environment and to foster innovative ideas. This is the contrary of the typical characteristics of established bureaucracies, which Child and McGrath (2001) describe as inflexible, and Jasmin, one of our interviewees, as ‘big tankers’. Combined with the assumption in the general business discourse that change is both good and necessary (Sveningsson & Sörgärde, 2013), this cultivated both the discontent with the status as a large bureaucracy and the idealisation of startups, which also can be described as adoration for their organisational anti-identity (Alvesson & Sveningsson, 2011). Thus, it was a desire to become more like their idols, the startups, that led to the top management’s

decision of adopting agile. Yet, this also sends a strong signal to the members of the organisation.

Oxford Dictionaries (n.d. b) define envy as “a feeling of discontented or resentful longing aroused by someone else's possessions, qualities, or luck”, and we find it to be a good representation of the feelings we captured from our interviewees. Instead of embracing the positive aspects of being a large bank, the top management of Piggy Bank indirectly communicated that the status quo was undesirable. This induced a feeling of incompetence, and along with the realisation that the organisation was far from fulfilling their jet ski fantasy, produced feelings of envy.

Envy is an innate human emotion, and whilst the implications of envy are uncertain, it is easy to envision a few. One implication is related to the well-being of employees. As the aforementioned definition of envy points out, it is a negative emotion related to jealousy for something that one currently does not possess. Having such feelings over a longer term is likely to generate mental stress and discomfort, deteriorating the well-being of the person in question. Furthermore, strong envy may lead to irrational behaviour in the quest to gain the qualities necessary to eliminate the negative feelings, and this could be one explanation for the adoption of agile at Piggy Bank. Moreover, these feelings of envy and dissatisfaction with oneself are also closely related to identity (Alvesson & Sveningsson, 2016), and the identity struggle we have drawn out here is in line with the findings of Josserand, Teo, and Clegg (2006).

The question of how the desire to be like a startup and the feelings of envy came to be is intriguing. One possibility is that it was driven by consultants and other agile preachers. Like the fast fashion philosophy adopted by large retailers in the clothing industry in which continuous launches of new collections make customers constantly crave the newest apparel, consultants and organisational development gurus create a desire for novelty in a similar manner. New management concepts are offered frequently and are advertised as better, faster, and more efficient than the previous ones. The apprehension for being perceived as out-of-date drives the desire to adopt these novel concepts. For instance, RUP was sold to Piggy Bank as the messiah that was going to solve all its problems. However, it was implemented in Project Goliath, which turned out to be a catastrophic failure. Then, when Project Goliath collapsed, agile was in vogue and taken on as the new saviour. This example raises the question of whether Piggy Bank can be characterised as either a ‘Tailor’ or a ‘Dabbler’ in

Cram and Newell's (2016) management fashion framework. It does appear as if fashion was an important driver for the adoption of agile, and thus evoked the feelings of envy, just like the fashion-conscious person would envy someone with even more fashionable clothes.

The general business discourse also offers explanations for both the idealisation of startups and the demonisation of large banking organisations. The former may be explained by the 'sexy' image that startups generally has in the contemporary society which also applauds the success of these underdogs. The latter can be explained by the image problem financial institutions have been struggling with for the past decade, something which was also highlighted by Piggy Bank's CEO in the introductory letters in multiple annual reports. This image problem is a result of both the fact that banks were considered to be the cause for the previous recession, but also due to the impression that traditional banks are greedy and bureaucratic. It is not unlikely that these views have influenced our interviewees to regard the size and industry of their employer as disadvantageous. It seems to be an unquestioned assumption in Piggy Bank that being large is positively correlated with being out-of-date, and that the opposite is true for startups. Drawing on Schein's (1985) model of organisational culture, it appears as if the glorification has become a part of their organisational culture through the valuing of some unattainable aspects that the startups represent. Thus, it seems as if the envy has come to stay until Piggy Bank either reaches its goal of agility, or decides to adopt an even newer way of working.

Another interesting connection is to isomorphism, which offers further explanation for why Piggy Bank tries to be something it is not. Referring to institutional theory, the adoption of agile at Piggy Bank appears to be a case of *mimetic isomorphism*. That is, an organisation copying the organisational structure of another organisation because it believes that its organisational structure is advantageous (DiMaggio & Powell, 1983). The reason for this is the significant role that the success of FinTechs and other startups played in the decision to take on agile.

All in all, understanding agile as the generator of envy within an organisation stands in stark contrast with the positive meaning generally ascribed to the concept. Hence, this may provide a cautionary tale to organisations that consider adopting this popular way of working by mindlessly following the crowd. This further highlights the vital role of critical reflection around the assumptions in these radical decisions, and the importance to thoroughly evaluate what the true reasons for adoption are.

## 5.2 Agile as Standardisation

One of the central arguments for adopting an agile way of working is the increased flexibility to respond to changing environments, something which is achieved by expanding the employees' autonomy through self-organising teams (e.g. Schwaber & Sutherland, 2017). This, along with increased productivity, was also the main argument used for the transition by the top management of Piggy Bank. Yet, whilst flexibility was communicated by the management, both as a goal and as a transition strategy, the employees instead perceived a demand for quite the opposite, namely standardisation. Thus, in this section we propose standardisation as an alternative and paradoxical meaning of agile, which is particularly relevant for large and bureaucratic organisations.

This contradiction between flexibility and standardisation is also yet another example of the decoupling of the top management and the organisational reality, as suggested by Hecksher (1994). In Barker (1993), the goal of the management was to improve the flexibility through a transition from a hierarchical bureaucracy to self-managing teams. Whilst the teams became self-managing, Barker argued that they did not increase their autonomy and flexibility. Instead, he observed a process where the dynamics within the teams led to concertive control where peer pressure and monitoring among workers became strong forces. Thus, instead of flexibility, the result was even stricter standardisation through norms for acceptable behaviour.

We found many similarities in our study. The two organisations share both the goal of increased flexibility and the outcome of perceived standardisation. Yet, the processes are different, and the cause of the standardisation in Piggy Bank was not due to intra-team factors. Instead, it was a result of the employees' perception of an ambition from top management for a uniform way of working. Fabian illustrated this paradox in the previous chapter. Firstly, he described that the main driver of the implementation, the agile coaches, had a desire to not cut edges off the agile frameworks, thus there was an inflexibility in the deployment process. Secondly, the edges which ended up being cut were those associated with the self-organising aspect of agile: The autonomy ingredient which should improve the flexibility.

In the introduction we described the process of the transition to agile as a shift of power. The understanding of 'agile as standardisation' is also a result of this process, but rather a lack of it. To achieve flexibility, the self-organising teams need autonomy. Through



the decision that middle managers should let go of their control, the executives do increase the power and autonomy of teams slightly. However, the power shift is not complete. In a large and bureaucratic organisation like Piggy Bank, the hierarchy consists of many levels. Thus, flattening the hierarchy at the bottom of the food chain does not change much in the rest of the organisation. In many ways, it is paradoxical that the top management decides to sacrifice the power of the middle managers, yet clings onto their own power through the introduction of policies and frameworks they believe will increase the flexibility and agility of the organisation. This closely resembles the literature on post-bureaucratic organisations, for instance the segmentation problem described by Heckscher (1994). He emphasised how the isolation of top management led to narrow perspectives and focus. In our study, this is manifested through the hybrid model proposed by Hodgson (2004) in which post-bureaucracy in the form of agile is found at the bottom of the organisation, whilst the rest of the organisation remains largely bureaucratic. This fosters frustration for all involved parties, as different parts of the organisation are operating at different speeds. This may induce further segregation between the organisational groups as they become increasingly decoupled.

The agile teams in Piggy Bank were self-organised in the sense that the team members could, to a large extent, choose tasks themselves from a team-based to-do list, but how autonomous is that? Five years after the agile transformation was initiated, Piggy Bank is still a big tanker fantasising about becoming a jet ski. Top management keeps communicating this ambition, and combined with their inability or reluctance to let go of some of their own power, this induces a confusion amongst employees which leads to the change initiative being a scattered fantasy project.

Overall, the perceived standardisation indicates that agile as ‘a package’ might not be the perfect fit for Piggy Bank. This refers to agile becoming de-contextualised and superficial. Agile developed from a methodology for software development flourishing in startup environments, to a one-size-fits-all package for virtually every industry. In line with management fashion theory, Prasad, Prasad and Mir (2010) express concern for this phenomenon. They argue that for organisations to achieve meaningful change, they need to be wary of superficial concepts proposed by consultants in manipulative ways. The danger here lies in the fact that these superficial concepts or management fashions, tend to lack *local relevance*, which is similar to the message we suggest with de-contextualisation. Additionally, since agile mostly can be described as a ‘culture thing’, one could question

whether it at all can be copied when the context is different. As Tolfo et al. (2011) argued, the adoption of agile should not clash with existing cultural values for it to become a successful implementation.

This understanding of agile as standardisation is one contribution to the agile literature focusing on the glossy pictures and grandiose claims about its efficacy (e.g. Rigby, Sutherland & Takeuchi, 2016). Instead of providing autonomy and flexibility, a top-down implementation of agile may lead to feelings of having to adopt yet another standardised way of working. This relates to our suggestion that agile may entail aspects of a charade due to the remaining command-and-control form of management in the organisation, contrary to the ideas underlying agile (Nerur, Mahapatra & Mangalaraj, 2005). One reason for this may be that an increase in autonomy also induces additional organisational complexity, which might not be desirable in a bank with a purpose of handling immense values and staying compliant with financial authorities. But if that really is the case, initiating a shift to agile seems to be in vain.

### **5.3 Agile as Managerial Boredom**

The third and last alternative meaning that we suggest, is ‘agile as managerial boredom’. In most literature on agile, the concept is portrayed as an organisational panacea which will not only improve productivity, innovation, and quality, but also employee satisfaction and motivation (Rigby, Sutherland & Takeuchi, 2016). These promises were also presented to the employees at Piggy Bank. Whilst a critical reader is likely to question this one-sided description of agile methodologies, many of our interviewees did in fact state that it was more fun to work agile compared to their previous way of working. Yet, this does not hide the fact that middle managers seem to be the group of organisational members which is particularly vulnerable to be put in an unfavourable position through agile. This is the result of conflicting demands from both the aforementioned assumption of managerial enthusiasm, but also their innate passion for the technical aspects of their job. This squeeze middle managers often find themselves in is well documented by Sveningsson and Alvesson (2016), and our case is an example of this in the context of agile.

In the previous chapter we exemplified this middle managerial boredom through Donald, a technical expert who had become a technical manager, but who the agile transition

had transformed into a general manager, decoupled from his passion for software development and computers. In his study of a shift to self-managing teams, Barker (1993) focus on the rise of concertive control and pay little attention to the implications for the former managers. Moreover, Cockburn and Highsmith (2001) point out that the role of managers diminishes through the adoption of self-organising teams in agile but offer no consideration for those managers. Hence, this is an organisational group often subject to negligence and marginalisation.

The shift of power and influence in the transition to agile raises the question of what is left for the manager to do. Since managing is a synonym for controlling and thus, manager a synonym for controller, the manager is left behind somewhat empty handed with mainly administrative and strategic work. Hence, from being a key player in an organisation where controlling has a crucial role, the manager gets sent into the periphery, left with the role of shielding the team from distraction (Cockburn & Highsmith, 2001). This may be particularly problematic for managers with a technical background, as they not only lose power, but also become decoupled with their field of expertise.

In traditional ways of working, it seems to be common that the highest performing specialists are offered and expected to take on managerial roles within that domain. This may be well-founded, or perhaps even necessary, as the manager has a much more central role in delegating tasks to specific individuals, and thus it is vital to have a good understanding of the technical aspects which are being worked on. Additionally, in traditional organisations, managers are those who often are relied upon for support and coaching and must therefore be technical specialists as well. For instance, Donald pointed out the necessity of managers to have credibility within the team through superior system understanding.

However, in an agile organisation this appears not to be the case. In agile frameworks like Scrum, the self-organising team is supposed to both divide the work between themselves, and also provide the technical support and coaching to each other through the cross-functionality aspect. Hence, a traditional manager is somewhat obsolete, and in the analysis we laid out two possible outcomes of this redundancy. One possibility was exemplified by Donald, and involves the decoupling with the technical aspects, with the likely consequence of feeling uninspired and bored. This may have deeper implications through fostering identity struggles, as people tend to construct their identities around their roles at work (Alvesson & Sveningsson, 2016). The alternative outcome, demonstrated by Alfred, is where the manager

attempt to hold on to the technical elements of the role, with the consequence of deterring the transformation to agile by hindering teams' autonomy. Neither can be said to be particularly favourable, and thus it is essential to have a plan for how to deal with the marginalisation of middle managers that an agile transformation may lead to.

## 5.4 Summary

To round off our discussion, we will summarise our three provided alternative meanings to the concept of agile below, before we move on to the conclusion in which we will 'connect the dots' and clarify the results and contributions of this research project.

One intriguing finding of this case study was that the idealisation of companies with a startup mentality and the demonisation of large organisations like Piggy Bank itself was dominating the organisational discourse. This may be induced by the general business discourse, in which organisation with a startup mentality are commonly considered as hip, or up-to-date, in contrast to large bureaucracies, which are seen as old fashioned. Furthermore, we found that this idealisation of startups led to the desire to become like one, and consequently the adoption of agile, a commonality among technology startups. However, this transition sends a signal to the organisational members that the status quo is not good enough. This further fosters feelings of envy with possible implications of reduced contentment and well-being among employees, and thus, the idea that agile may induce envy is an important and alternative perspective to the general view of agile as a panacea.

Large bureaucracies are generally considered as rigid and slow. 'Big tanker' was a metaphor used by one of our interviewees to highlight the low manoeuvrability. This inflexibility is what many of these large banks cite as their main reason for adopting agile. Rationalised by increasingly swift changes in their business environment, they see a need for increased flexibility to fight back the competition found in innovative startups. The idea is that agile through its self-organising teams, increased transparency, and enhanced collaboration will produce the desired flexibility. We do not omit the possibility that the changes made Piggy Bank better suited to tackle these new competitors. Yet, our finding that agile is experienced as just another standardised way of working is paradoxical, and we believe this may be a common problem for large bureaucracies adopting agile. As earlier elaborated upon, scholars like Heckscher (1994) have theorised that the segmented roles in

large organisations lead to narrow focus within the different organisational layers. Top management's role is to develop strategies, and the rest of the organisation should implement these. We also observed this decoupling at Piggy Bank, where interviewees expressed frustration for what they perceived as a demand for a uniform way of working. Thus, as the executives are distant from the agile reality, they continue developing policies and frameworks like in any bureaucracy, resulting in questionable autonomy.

The third and last alternative to the meaning is 'agile as managerial boredom'. A group of people that is especially affected when attempting to transform from a bureaucratic organisation to a post-bureaucratic and agile organisation are the middle managers. Much attention in talk about agile is drawn to advantages of shifting to self-organising teams, with increased autonomy, enhanced collaboration, and improved communication, to name a few. These undoubtedly have certain positive effects on the organisation, but nevertheless, in this process, middle managers become marginalised, with all the consequences that this entails. One of these consequences was interpreted as boredom. The manager gets decoupled from the daily organisation because the teams take over, leaving the manager behind with mundane managerial and administrative tasks mainly involving PowerPoint presentations, distant from the thrill of the technical aspects that got them into the position in the first place. It is interesting how top management seems to assume enthusiasm and engagement for the change process from these middle managers, and we got the impression that the middle managers were considered as 'puppets' of top management, oblivious to the middle managers' position as change recipient.

All in all, the fact that the expectations of top management concerning the agile transition clash with the organisational reality, already gives an indication that agile might not be the organisational panacea that current literature portrays it to be. Instead, it shows how agile is a radical departure from traditional ways of working in large bureaucracies. It calls for drastic adaptations in all facets of organising, from strategy and structure to culture and identity. Management fashion theory and the concept of isomorphism can offer explanations for why such a radical transformation is desired by prestigious and well-established organisations. In contrast to the cure-all image that is associated with agile, the concept may have less desirable implications such as being a generator of envy, and causing boredom among middle managers through the marginalisation of their role. Hence, by considering the alternative meanings together with the established one, agile may be described as a double edged-sword, a metaphor which creates a suitable bridge to the conclusion.

## 6 Conclusion

The aim of this study was to demystify the one-sided meaning assigned to agile as an organisational panacea by enriching the scarce literature on agile methodologies. Specifically, we wanted to answer the following question:

*How do managers and team members experience the shift from a bureaucratic way of working to an agile way of working?*

In the process of investigating this research question, we uncovered three alternative meanings for the concept of agile by the means of an interpretative case study at Piggy Bank, one of Scandinavia's largest banks. The three meanings that we proposed are 'agile as an envy generator', 'agile as standardisation', and 'agile as managerial boredom'. The provision of these alternative meanings enriches the current understanding of agile. By doing this, we aspire to make the decision of radically transforming one's organisation to an agile structure a calculated choice instead of a change project based on fantasy.

It has to be emphasised that these meanings should not be perceived as exclusive, but rather as complementary to each other and to the established view of agile as an organisational panacea. These meanings were interpreted from fourteen in-depth, semi structured interviews with people from across the hierarchical ladder. Moreover, we contextualised our interview material by conducting observations and studying internal documents, such as annual reports and the 'Change Handbook' used in the transition.

We would like to end by revisiting our analogy of 'fantasy project', in which we refer to the transition to agile at Piggy Bank. Our paper has shown that despite the merely positive connotations in current literature, this does not directly imply that agile brings purely positive results to organisations that implement this concept. Instead, agile can have divergent meanings, both positive and negative, and can therefore be seen as a double-edged sword. In the process of becoming so widely popular, the sensitivity for agile being about 'the mushy stuff' has been repressed and exchanged by glossy success stories. For that reason, our study can provide a notion of reflection to managers before moving to an 'agile way of working',

and be a cautionary tale reminding decision-makers to engage in careful consideration of multiple meanings and interpretations instead of mindless imitating their idols. Additionally, this insight contributes to an improved scholarly understanding of a transition process from a bureaucratic to a post-bureaucratic organisation, and adds new aspects complementing studies such as Barker (1993).

Whilst we chose to illuminate some undesirable implications of agile, this study also illustrated some positive aspects, such as improved communication and collaboration, and therefore does not directly contradict the positive connotations underlying agile in the general business discourse. However, this does not make agile the all-curing panacea that it often is presented to be. Many fantasies indeed tend to remain as fantasies.

## **6.1 Further Research**

Overall, our case study provided significant depth in the understanding of sensemaking in relation to agile, something that complements the current literature mainly derived from survey research and inadequate research paradigms. We provided insights through the sensemaking of change recipients of the relatively recent trend of moving from a bureaucratic, traditional organisational structure to a post-bureaucratic, agile structure.

Nevertheless, the limited scope of this study merely scratches the surface of the sensemaking that this type of radical transformation involves. The subject matter would benefit from further contribution in the form of case studies to provide both additional breadth and depth to the points made in this paper. General business discourse would benefit from further investigation into the meaning of agile, to enrich the concept and provide comprehension of how people subject to such a transition experience agile. This could be advantageous for scholars to further understand an increasingly popular management concept, but is also relevant for practitioners, as an improved understanding of agile enables more sound and meaningful implementations.

Moreover, since it is a relatively recent development that organisations such as the one utilised in our case have started to move to agile, it would be interesting to conduct a similar study at a later point in time when the way of working has had time to mature in the organisation. Furthermore, in order to get a broader picture of the meaning of agile that goes beyond large, traditional organisations, it would be intriguing with investigations of the

sensemaking of agile in other types of organisations such as startups. Lastly, despite the fact that some of our findings are closely related to both individual and organisational identity, a thorough investigation of this was outside the scope of this study. Thus, a lengthy ethnographic study would greatly enrich the current understanding on agile in large and bureaucratic organisations and potentially shed additional light on the points made in this paper.



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