Management Learning and Identity Regulation

Tony Huzzard[a]
Robert Wenglén[a]

[a]Department of Business Administration
Lund University, Sweden
tony.huzzard@fek.lu.se
robert.wenglen@fek.lu.se

Abstract

This paper explores the relationship between individual managerial learning and identity in organizational settings and how this relationship is shaped by the processes and practices of identity regulation. Our point of departure is that identity regulation by top management directs the iteration between self-identity and identity work of middle managers, and we than argue that such iteration is intimately bound up with their on-the-job learning activities. We illustrate these themes through a case showing that identity regulation has not only impacted on the identity work of middle managers, but that such processes have also limited the subject positions available. Identity regulation has prompted them to learn what it is to be a manager and how to conduct their work in an uncomfortable and tense work context. Nevertheless, some scope for agency remains in that such managers can exercise exit, loyalty or voice as an outcome of their learning process.

Keywords: management learning, identity regulation, sensemaking, identity work, discourse

Suggested track: F or G

1 Introduction

Recent work on learning in organizations has sought to explore the linkages between learning processes and identity formation. For example, at the individual level Willmott, (1997, p. 162) sees learning as '…the acquisition of ways of relating to the world. It includes the development of our relations with others, through which a (precarious) sense of identity and autonomy is constructed'. Corley et al (2001, p. 103), focusing on organizational learning, argue that '…identity construction and reconstruction are intertwined with a continuous process of organizational learning because the organization must continuously relearn its identity as its enacted environment recursively influences further action taking'.

Lave and Wenger (1991), in their initial exposition of situated learning theory, make the linkages between learning and identity even more explicit. For them: '…learning and a sense of identity are inseparable. They are aspects of the same phenomena' (ibid, p. 115). Gherardi and Nicolini (2000, p. 332) argue much the same thing by dismissing the notion of learning as being the acquisition or appropriation of bits of knowledge and pointing out instead that it is increasingly '…viewed as the *development of situated identities* based on participation in a community of practice' (italics added).

This paper aims to develop these themes by exploring the relationship between individual managerial learning and identity in organizational settings and how these are shaped by the processes and practices of identity regulation associated with organizational control (Alvesson and Willmott, 2002). We argue that the more or less ongoing search for a secure identity by middle managers is intimately bound up with their on-the-job learning activities. In developing this argument, we follow Weick (1995) in seeing sensemaking as generating new actions or identity work. However, this process involves constructions of identities. In other words, sensemaking is based on and involves the creation of identity constructions of the self and others, which then informs which actions to take in what is in effect a learning process. The question remains, however, how are such processes related to wider practices of organizational control?

We illustrate the argument through a case study of a private sector school in Sweden (SchoolCo) owning and running a number of secondary schools. The study was ethnographically inspired (Watson, 2001) and conducted over a period of two years with a focus on the practice-based learning of heads of schools. The empirical material used in the paper, however, focuses on the learning of six middle managers associated with the events and talk at two day-long meetings between the CEO of SchoolCo and

the heads of its various school organizations. Prior as well as subsequent interviews with managers present at the meetings elicited data on their processes of reflection and learning.

In particular, we are interested in the practices and effects of identity regulation exercised by the CEO on the heads as de facto middle managers of SchoolCo. The case analysis shows how the practices of identity regulation have impacted on these managers' identity work. From this, we argue, that such practices have limited the number of possible subject positions available and prompted them to learn what it is to be a school manager within SchoolCo as well as how to conduct their work in an albeit uncomfortable and tense work context.

The structure of the paper is as follows. We proceed by discussing the main concepts in focus, namely communities of (managerial) practice, sensemaking, identity work and identity regulation and how these are integrated into a single frame of reference. Following a discussion of our methodology of ethnography for data construction and discourse analysis for data analysis, we present the case study and show how distinct processes of identity regulation have impacted on managerial learning. We conclude that management learning can indeed be seen as an element of a wider regime of organizational discipline and control. Nevertheless, our empirical material shows that some scope for middle management agency remains in that such managers can exercise exit, loyalty or voice as an outcome of the management learning process (Hirschman, 1970). Accordingly, organizational members including middle managers are not reducible to being passive sense-takers or discursive victims (Huzzard, 2004).

2 Conceptual overview

In this section we specify four concepts which we believe can usefully aid our understanding of the linkages between managerial learning and the identity regulation that comprises a key element of organizational control. These are communities of managerial practice, sensemaking, identity work and identity regulation. We conclude the section by proposing an integrated model of the managerial learning process.

2.1 Communities of managerial practice

According to situated learning theory, learning is an integral aspect of social practice whereby '…the mastery of knowledge and skill requires newcomers to move toward full participation in the sociocultural practices of a community' (Lave and Wenger, 1991, p. 29). In other words, learners, as novices, partake in specified arenas of interaction and gradually acquire 'expertise'. Knowledge is socially constructed: when actors draw on

new 'knowledge' they attribute it with new meaning, contextualise it locally and translate it into practice through everyday interaction. Lave and Wenger's empirical illustrations of this idea of the learning process included midwives, quartermasters, butchers and non-drinking alcoholics; in each case members of the community of practice concerned progress from an initial phase of what Lave and Wenger call 'legitimate peripheral participation' to a state of full membership of the community as they learn the ropes.

In our view, managers also learn through processes of social interaction, but the notion of a final destination of 'expertise' is more problematic than that associated with, say, photocopier technicians (Orr, 1996). Managerial learning can perhaps be better understood as an ongoing process of 'becoming' (Parker, 2004). We can nevertheless talk of managers seeking to become less peripheral and more legitimate as they interact with their managerial colleagues and superiors in the line management structure.

For middle managers, however, there are two distinct communities that have quite separate arenas of interaction and are thereby two quite distinct social processes: first the community of managerial practice whereby a middle manager interacts with his or her managerial peers and seniors and second the community of everyday practice wherein he/she interacts with subordinates at the workplace. Iteration between these two communities involves a tense and precarious struggle in terms of meanings and identities (Sims, 2003; Sveningsson and Alvesson, 2003; Thomas and Lindstead, 2002). In the case which follows the arena in which the managerial community of practice is played out is that of periodical meetings between the CEO of the company, SchoolCo, and his school heads as de facto middle managers.

2.2 Sensemaking

The tensions, contradictions and divergences from expectations that arise from the interactions in the managerial community of practice are then taken away by individual managers and reflected upon where the meanings conveyed at the management meetings produce a 'jolt to the senses' for the manager and a round of sensemaking begins (Weick, 1995). Here the new messages conveyed by senior management at the managers meetings act as a cue for the middle manager. He or she has an interpretive frame that is historically derived within the context of work practices at his or her particular workplace and how these have evolved over time in interaction with the middle manager's identity.

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Sensemaking involves the construction of texts in the heads of leaders in the emergent communities of practice when equivocality arises (Huzzard, 2004). Part of the middle manager's role is to establish some sort of predictability and taken-for-grantedness of routines within the span of control for which he or she has responsibility. When the sense associated with a particular set of routines is broken, a new situation arises when there are too many meanings for the actor rather than too few (Weick, 1995). This is a problem of equivocality (rather than uncertainty) and triggers sensemaking. In order to cope in such situations, people require values, priorities and clarity about preferences; these, in our view, are inextricably bound up with issues for the manager of "who I am, who I would like to be, who I can be, who I am becoming and what I should do". The sensemaking of the middle managers identified here is thus inevitably bound up, therefore, with the manager's identity.

2.3 Identity work

Research in recent years on organizational subjectivities has reflected increasing degrees of disenchantment with studying the individual in terms of either genetic determination or essentialistic views of human needs (Thompson and McHugh, 2002). Accordingly, an alternative view has emerged that argues that in effect we seek to secure our identities as a means of providing us with a sense of stability, coherence and distinctiveness (Knights and Willmott, 1985; Whetten and Godfrey, 1998; Thomas and Linstead, 2002; Collinson, 2003; Sveningsson and Alvesson, 2003; Sims, 2003). In turn, we act or to be more precise, we interact, in such a way that our identities are best secured and enhanced. However, identity is precarious and in flux – in this sense we can talk of actors including managers in a state of permanent 'becoming' (Thomas and Linstead, 2002; Parker, 2004).

The notion of acting in order to secure, defend or enhance one's identity has been termed in the literature as *identity work* (Alvesson and Willmott, 2002; Thompson and McHugh, 2002; Sveningsson and Alvesson, 2003). This is defined by Sveningsson and Alvesson as that whereby people are 'engaged in forming, repairing, maintaining, strengthening or revising the constructions that are productive of a sense of coherence and distinctiveness' (ibid., p. 1165). Such activity or work, moreover, may be ongoing on the everyday level or arise from more episodic crises. In our view, however, it is useful to talk about identity work occurring as a result of equivocalities of the self, in other words when cues, be they trivial and derived from everyday social processes or more sporadic and serious, appear to threaten the very security on which identity is founded.

Not all sensemaking leads to identity work; all identity work is nevertheless guided by processes of sensemaking. In the case of middle managers, the cues that drive sensemaking and thereby (potentially) identity work originate in two distinct communities of practice. As the discourses operating in these two arenas are also distinct and quite possibly contradictory, the middle manager's identity is indeed a fragile one, or as Sveningsson and Alvesson (op cit) put it 'this makes identity constructions precarious and call(s) for ongoing identity work'. In our view, however, managers are also required to reflect on the outcome of their identity work and the context in which it is performed before identities can be (re)secured, a practice that can well trigger further rounds of sensemaking (see double arrow in figure 1). Seen from such a view, the (re)construction of identity is in effect a process of *learning*.

2.4 Identity regulation

As stated, the processes of sensemaking that may lead to identity work arise from cues derived from the social interaction of managers within communities of practice. In our view, cues of considerable significance in the case of middle managers are those of attempts by senior management to shape the minds and bodies of their middle managerial subordinates. In effect this concerns practices and processes whereby senior management define the situation, tell stories, devise categories and utter speech acts to obtain compliance within the managerial community of practice as an attempted means of securing organizational control (Alvesson and Willmott, 2002).

Such attempts at control have been termed *identity regulation* (ibid) in that senior managers engage in more or less intentional practices, in particular the management of meaning (Huzzard, 2004), that target and mould the subjectivities of employees (in this case middle managers) through the medium of discourse. The way this works is that the employees targeted are urged to develop a strong sense of identification with the organization. Accordingly, the self-identity of the employee is (re)constructed at the same time as a sense of organizational identification is strengthened and alternative subject positions are closed off. In the case of middle managers, their already fragile sense of identity is thrown into further turmoil as their superiors construct new discourses in the community of managerial practice – and further rounds of sensemaking, and potentially learning, begin.

2.5 Learning, identity work and identity regulation – an integrated framework

In sum, definitions of the environment and environmental enactment are conducted socially within the communities of practice in which managers participate. This involves

a process of flux whereby individuals are obliged to reflect on who they are and who they are becoming in relation to others in the community concerned (Weick, 1995, p. 77). When engaging in sensemaking, middle managers work from the core shared beliefs of two distinct communities of practice – these provide 'anchors that enable members to define the competitive space and their position within it' (ibid). This identity struggle (Sveningsson and Alvesson, 2003) is not a purely cognitive phenomenon, however. In our view, managerial sensemaking can be usefully explored by asking the question 'How can I know who I am until I reflect on what I do?' (cf Weick, 1995). Seen in such a way, sensemaking is inextricably bound up with identity work involving reflection on one's (past) actions.
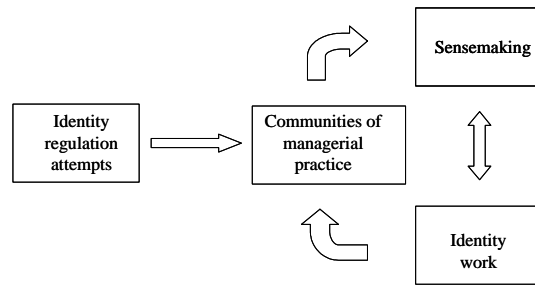

Fig. 1. Identity regulation and the management learning process

In other words, a process of learning can be discerned whereby sensemaking results in reconstructed managerial identities, which inform new actions, both in the everyday community of practice at the workplace and the more sporadic community of managerial practice wherein practices of identity regulation are played out. Accordingly, middle management learning in relation to identity regulation attempts can be understood as described in the model depicted in fig 1.

3 Method

This study is based on an ethnographically inspired case study of a Swedish school company. In other words the construction of the empirical material has to some degree followed an ethnographic tradition. Broadly speaking it involves three modes of data generation: 'asking questions', 'hanging around' and 'reading texts' (Dingwall 1997). Observations have been made at three schools, at the yearly company days and at managers' meetings. Interviews have been conducted with the CEO, heads of schools, teachers and pupils. All in all the empirical material comprises of 18 days of

observation, 46 face-to-face interviews and 6 telephone interviews during a time span of four semesters (two school years). Almost all of the interviews were performed *in situ*. We have also studied a wide range of documents, including business unit plans, manuals, evaluations, protocols from parent meetings, newspaper articles and so on. Due to space restrictions, only a part of this material is explicitly referred to in this paper, but we can claim close, intimate and broad contact with and knowledge of the case object. Most of the fieldwork was undertaken by one of the authors of this paper.

The task of teasing out identity regulation themes was inspired by organizational discourse analysis. This can in some ways be seen as an all-embracing (catch-all) phenomenon (Alvesson, 2004) that has become popular for many qualitative researchers. One way of seeing organizational discourse analysis is that of a plurivocal project (Grant et al, 2004). Many definitions of discourse exist in the literature; we have in this paper followed Grant el al's (ibid, p. 3) definition of (organizational) discourse as something that: "refers to the structured collections of texts embodied in the practices of talking and writing (as well as a wide variety of visual representations and cultural artefacts) that bring organizationally related objects into being as these texts are produced, disseminated and consumed" (see also Phillips and Hardy, 2002).

The above definition thus relates to a structured set of texts embodied in language that creates, or recreates, organizational objects. This definition is similar to how Foucault writes about the term as an "interrelated sets of texts that systematically form the objects of which they speak" (Foucault, 1972, p. 49, quoted in Ainsworth and Hardy, p. 154, 2004).

In other words, and as a main characteristic, discourse analysis differs from more functionalist or modernist research approaches in that it is based on the idea that language does not mirror reality. This is also a starting point for social constructivist approaches (cf. Alvesson and Sköldberg, 2000; Berger and Luckmann, 1966; Hatch, 1997). The way the former differs from the latter, however, is that advocates of discourse analysis do not just think that concepts are socially constructed. They believe that concepts (language) shape (construct) reality. As language creates reality, it has material effects in real life. It also differs in its object of focus. For constructivist (cultural) researchers human beings (locals) are important and put centre stage, whereas discourse analysts put (impersonal) discourses at the centre (Alvesson, 2004).

Further, a constructivist (cultural) framework "assumes the existence of ideas and meanings that construct a version of the object without a specific, explicit and present

"text" producing it", while a discourse approach "does not assume the existence of meanings just 'being there', outside language" (Alvesson, 2004, p. 328). Another difference is the tendency in constructivist research to view language as something that may reveal underlying meanings, while in discourse approaches language creates temporal meanings. A final distinction is that constructivist, at least cultural approaches, have an interest in broader, more holistic concerns, while discourse approaches, at least those with a focus on the micro level, tend to highlight the fragmented and fragile aspects of organization (Alvesson, 2004).

However, the field of discourse analysis still ranges over rather different alternatives. Alvesson and Kärreman (2000) distinguish between approaches that range from micro to macro and from believing in discourses to be fragile to rather muscular (discourse with a small "d" or with a capital "D"). Further, Phillips and Hardy (2002) distinguish between approaches that are rather constructivistic or more critically oriented, as well as between an interest in text versus context. Hardy and Phillips (2004) are representatives of a more critically oriented approach (and rather tightly coupled with a more muscular view on discourse), as illustrated in statements such as: "power and discourse are mutually constitutive: at any particular moment in time, discourses… shape the system of power that exists in a particular context by holding in place the categories and identities upon which it rests" (Hardy and Phillips, 2004, p. 299).

To sum up, a number of different approaches are possible when it comes to discourse analysis. The approach to choose should, we argue, be an empirical question. For example, whether or not a discourse is fragile or muscular cannot be taken for granted. Here the strengths of counter-discourses as well as other moments such as power, beliefs/values/desires, institutions/rituals, material practices and social relations have to be considered. The interpretation of the empirical material in this article departs, however, from a view on discourse that is slightly fragile, meso and context oriented. It has a bias towards constructivist approaches, that is, it has a focus on the processes of self-identity construction.

4 SchoolCo – a case study of management learning

SchoolCo is a privately owned school company in Sweden. It runs over 25 schools in different cities and can look back on 10 years of successive growth in a context where the majority of schools are within the public sector. In SchoolCo, management meetings are convened once every month, where top management meets with the school heads. These meetings can be seen as an opportunity for identity regulation. Here the CEO expresses, as will be shown below, the subject positions he wants the

heads of schools to identify with or not. It is also an opportunity for the school heads to detect which subject positions are favoured and thereby successful in relation to superiors.

The fact that the CEO attempts to engage in identity regulation becomes clear in statements such as "Difference is one of our fundamental values – for this to be cultivated we have to do things in a similar fashion" and "for those whose quest for happiness is that of a quiet life there are few opportunities for job satisfaction (at SchoolCo). On the other hand, people are welcome who are motivated by meaning and desire, where the quality of life is equated with an active presence". This suggests that an articulated ambition is sought at the same time as "they (existing and potential employees) will not get anything we don't believe in. In such a case they must look elsewhere". In fact, the company idea is fixed. For example, during one meeting the CEO brought up the complaint that some people accused SchoolCo of being "run by ideology" and "controlled from the top" and that there should be wider scope for "autonomous units". Against this the CEO posited that "if so, then you shouldn't be at SchoolCo because you're not interested in creating something together" and "in such a situation it won't do to devote a whole load of time to discussing your own working hours".

Below we describe two subject positions that are strongly emphasised in the discourse. These are also stressed as being quite different from those of public sector schools and therefore particularly challenging for the school heads. These suggest, we argue, the need for the heads to identify with being i) profit makers and ii) advocates of the company's allegedly radical pedagogy. In other words, middle managerial learning, in this context, is tightly connected to allowing (or refusing) new self-identities to evolve.

4.1 Identity regulation 1: The profit maker

As private schools are rather new phenomena in Sweden, neither teachers nor school heads are brought up with the idea of schools being profitable. On the contrary, working in schools has traditionally been connected to other values such as solidarity and altruism. For many teachers in Swedish schools, profit interests have at least not been seen as something appropriate in connection with the education of children.

But at SchoolCo both growth and cost reduction were common themes at the management meetings. At one meeting the theme of the day was "sell and choose". Here is a short extract from the field notes:

"You must work harder to attract the customer today than two years ago, much harder", the CEO says. He then writes on the board that the newly started schools need to recruit 1800 pupils, planned new establishments require 1500, the older schools shall expand by 500, Eva's school by 200, whereupon Eva says "then we'll have to change premises". The CEO continues by talking about the need to recruit while he moves towards the middle of the stage. Suddenly he shouts as he gesticulates wildly: "Sell, Sell, Sell" followed by "This has sod all to do with pedagogical development" so that many of us jump with fear.

The CEO sinks his voice and continues his lecture, which continuously contains questions and pronouncements aimed at those present. For example, someone who has undertaken duties at recruitment fair is asked how many new pupil recruits will be likely. No doubt feeling put upon, she pulls out a figure. The CEO then probes this with the question of how many brochures she has handed out. This turned out to be 1000, whereupon he says that a normal co-efficient for this type of sale is that one recruits one in a hundred which would mean 10 people, which is "far too few".

Later at the same meeting the CEO returned to the recruitment theme:

The CEO tells the audience that he estimates that wrongly recruited teachers over the last year have cost SchoolCo around 6 million SEK. He therefore asks those assembled to calculate this in terms of staffing whereupon someone quickly suggests a figure of 20 full-time posts. The CEO continues with what appears to be a lesson in financial thinking and says that some were complaining that certain personality tests were expensive to buy and that "it was like straining ants and swallowing elephants". He then says that "this we have to change" and that he wanted all to understand that recruitment continued from 1st until 31st December next year. "It is a dry run up to 15th August. You know how it is with ducks, one in three survives. We need one extra teacher per five now employed".

The CEO then declares that the second and third weeks in January will be devoted to recruitment. He continues: "Do you know what's going to be tested in this process? Yes, it's mutual trust. Those who are fully staffed do not need anyone". He then says that the near future contains two foci - "sell" whereupon he leans to the right and "choose" whereupon he leans to the left and takes a pause for effect before adding "OK – wash your mouths out; we'll now take five minutes rest".

As we can see the SchoolCo CEO is rather aggressive when it comes to growth both in terms of recruiting pupils and teachers. But he is just as concerned with cost reduction.

They do not hesitate to end a trial period of employment if things do not work out as expected and cost control is a frequent discussion theme at the managers' meeting. Here is a short extract from the field notes on how this was expressed:

"Now let's talk hard data, in order to gain something you have to earn it" the CEO says. He then shows on overhead slide setting out the financial results at all schools in terms of the actual half-yearly results against budget. It turns out that the schools established prior to 2000 are in line with budgeted profit levels, but not the newer ones. The latter gets rather critical comments from the CEO such as "School A has (X) in profit and should have had (Y) and this depends on overstaffing and salaries being too high". It is apparent that the older schools finance growth in the company, which manifests itself in his varying demands for results. Of the newly started schools, he highlights Hale as a good example and asks him to recall what he has said to the CEO previously. Hale takes the floor and says: "I usually say this to my teaching staff. It's the seven of us who should do it. No more teachers will arrive. We can't stand around and wait for someone else".

Connected to the housekeeping on teaching posts is the issue of hours of duty being calculated on an annual basis: "You can't do overtime until the end of the year and it has to be authorised" and "we have support in our preparations (for the proposed new school legislation). Legal and medial issues we can handle without any difficulty. The question however is this: Do we believe in what we are doing?". This theme turns out be a central theme of the small group discussions after lunch. The aim of the discussions is to "create between us as managers a common clear and transparent position on human resource issues". These were specified as working hours, forms of employment, employment conditions and salary policy. The expected result of the exercise is also specified: "The issues of hours of duty and salaries should be replaced by the issues of assignments, opportunities and job satisfaction".

When the groups reassemble the CEO whistles and asks for reactions from the group work. Among the voices is heard: "We have to change: we can get people to work for such a salary. People should think that they want to pay to work for us and want to do all they can for SchoolCo". Thereafter the CEO gives a short summary of his earlier lecture. He shows the overhead slide used previously and finally arrives at a plan for action. This includes reduced salaries and reduced preparation times for certain teachers. Someone proposes instead that they should "increase the number of pupils", to which the CEO answers "good idea!"

The talk at the meeting, convened and run by the CEO, thus contained strong discursive elements. For example, organizational performance in terms of profitability was foregrounded. This discourse of commercialisation is evidenced by exhortations on the need for greater pupil recruitment as a means of securing increased revenue generation. These discursive acts, we argue, are performed in an attempt to regulate subordinate managerial identities and are perceived by the managers as ways of regulating and limiting the number of possible subject positions available, which in turn influence the possible trajectories of situated managerial learning.

4.2 Identity regulation 2: The advocate of a "radical pedagogy"

The discourse of the head of school as a profit seeking businesswo(man) is connected to a radical vision – to change the Swedish school system. It includes an overall goal of "giving the pupils life chances" rather than bits and pieces connected to more or less technical goals such as the percentage of pupils who pass exams. But SchoolCo is not just emphasizing a more holistic goal; its leadership are using different means – what is portrayed as a rather radical pedagogy. We set out below an extract from the field notes showing how this radical pedagogy is expected to express itself in practice:

We are now into the closing stages of the meeting. The CEO says that he wants to round off the meeting by showing a short film that two members of the top management team have shown to the National School Agency earlier in the day. When the film starts to play, one of these individuals shouts out "turn up the volume", whereupon the volume is increased and the lights turned off. It turns out to be a film produced by three girls at upper secondary school about physics, chemistry, biology and medicine. One of the girls acts out the role of presenter while the others are reporters. The film is without doubt an impressive production even if a giggle or two is heard amongst the audience when the editing or speech, for understandable reasons, shows some signs of amateurism.

When the film is over and the lights are switched back on the CEO walks slowly towards the middle of the stage. With a tearfilled and weak voice he says "it touches you emotionally". The CEO's actions appear to colour the atmosphere in the room. Personally, I experience an obviously emotional atmosphere and silence prevails. The CEO breaks the silence by humbly asking "what grade in Swedish would you give this girl" at the same time as he draws a table on the whiteboard 'pass', 'pass with distinction', and 'and pass with great distinction. First to respond is a member of the senior management team who says pass with great distinction. The next in line says that it depends on what she has achieved throughout the term. The CEO answers by

repeating the question. The previous contributor then makes a further attempt to problematise the question but is interrupted by the CEO in a determined fashion whereafter the man answers "pass with great distinction". Ten more people utter a resounding "pass with great distinction" at the same time as the CEO draws a line for each answer in his table. A few more respondents are called before a new male recruit says something about sentence clauses "but pass with great distinction" and another new recruit says "I would want to break the pattern but I can't". The CEO responds: "I appreciate that comment". It's only when we come to Eva that we hear "pass with distinction – question mark", which is also noted by the CEO on the board. The four final heads all say "pass with great distinction".

"OK, you all think she's worthy of a pass with great distinction, so she'll surely of course get this", says the CEO who continues "The consequences are that she shouldn't need to go to any more Swedish lessons". The pupil, who has yet to formally finish her studies in her particular year should in other words already now have a final grade of pass with great distinction. A female school head takes the opportunity with a broad smile on her lips to comment that the girl is a previous student of hers. The CEO continues and now successively raises his voice: "we get 50,000 krona per student per year, give her 25 and we'll take 25 and let her come back and present something on the 10th of May when she'll already have moved up a year". Violent laughter breaks out. The CEO continues: "and then we can take in someone else in her place". When the laughter is still in full swing the CEO drowns us out by saying: "You can combine competence development with profitability" whereupon, laughing, he leaves the room through the door behind me.

As we can see, school heads are expected to be advocates of what is portrayed as a rather progressive pedagogy. They are even expected to engage themselves in changing the self-identity and work practices of the teachers associated with this "radical pedagogy".

5 The impact of identity regulation

In this section we direct our attention to how the CEO's attempts to influence the identity of the school heads are interpreted and received by the latter. One (contemplated) school head described, when asked in an interview about what he had learnt from one of the meetings, how he observes the CEO and mirrors himself in his behaviour: "I have got ideas, it is interesting to see how the CEO managed this… he tells a story, puts the problem in a context… builds a culture… wants us to go in a certain direction… and that we understand something in a particular way".

Another school head said that her main reflection after one management meeting was connected to the CEO and how she wanted to relate to him in the future. She commented that there was "major group pressure" when the CEO wanted the audience to grade the girl: "surely you can be generous but we knew nothing about the written language and that must also be included in the final grade". She found the atmosphere "very uncomfortable". She described the CEO as "charismatic" and that "surely it can be good and you get pepped up", but it was also as a "hallelujah rally". She took up the incident when the CEO screamed "sell, sell, sell" whereupon she said that that was like being at a sales meeting and that she herself found it uneasy and that the new employees must have had an eye-opener in that "they had probably not seen things in that way earlier". She also took the opportunity to say "…if they now dare admit it".

When asked about what she had learnt from the meeting, she answered: "I have learnt that I should dare to say 'no'". She herself would feel better if she raised objections and the CEO would also certainly want people to object. The potential learning thus expresses itself in terms of *how she would want to orientate herself at the forthcoming management meeting*. She has made a number of reflections and the meeting is thought to have affected her to such a degree that she has decided to try to act in another way on the next occasion.

Furthermore, her image of the CEO appears to have changed. In an earlier interview she described him in terms of an "incredible and fantastic driving force" and said that she looked forward to "learning to get to know him". After this meeting she gave the impression that she had become concerned that she had started to see other sides of the CEO. She asked herself, which was subsequently confirmed in a later interview, what these new sides meant for her own work. What was the CEO's real agenda? Was he a culture-driving community developer, a product of the culture or a seductive businessman? What did he really want and how should she relate to this?

The meeting can thus be seen as a disciplinary process, or at least as a (rather successful) attempt at identity regulation (Alvesson and Willmott, 2002). On a number of occasions the managers get to learn what matters and what was not appreciated. In the words of Cia, another school head, expressed in the interview prior to the meeting: "You're not always allowed to have a dissenting opinion". She continued: "I always go to the managers' meetings with a pain in my stomach. You never know what will happen. It can be quite a different agenda and has been so many times … a feeling of some unease … You can come in for something unpleasant. An opinion that you can't make anything out of. Or that you ask too much and get chopped to pieces. Cut up…

the CEO can do that sometimes in a way that is unpleasant. Many managers have been targeted … Whose turn is it next time and so on and some managers walk out".

Moreover, Cia said that what was thought to characterise the meetings in recent times had been that: "important questions we deal with by telephone conferencing and information is given out at the management meetings". In addition, the other school heads are thought to contribute to the meetings taking on this character. Angelika considered that: "we sort of go there and expect to get, and we do get, masses and then we demand an awful lot from the leadership". Lena echoed such views: "We just sit there and agree and we are not sufficiently honest. I've not experienced any great frustration myself but I know there is some. But it's perhaps because I can think it's comfortable to just sit back and accept something. That someone else sets my thoughts in train. As a rule I'm rather quiet at the meetings but I need to let things sink in. You get like that with age. You don't have the same needs to shout out: *what do you mean by that*?"

Cia explained the conformity in terms of the growth of the company having resulted in the school heads: "not learning to get know each other sufficiently well that they dare to be open". She added that: "they turn into halleluja rallies" and "you describe all the good things you do and yet you know that there is chaos on various things because that is how it is at our units".

6 Discussion

Prior studies have pointed to the importance of identity as a vital dimension of learning (Lave and Wenger, 1991). Identity has also been highlighted in regard to sensemaking (Weick, 1995). What we can do or know is connected to who we are – to our self-conception. This happens in relation to other people, but it is a struggle for middle managers to know with whom they should identify, as they are squeezed between different interests. In other words, identity work seems to be especially important in relation to (middle) managerial work (Sims, 2003; Thomas and Linstead, 2002; Watson, 2001) and middle managerial learning (Wenglén, 2005).

Thus, self-identities are not produced in solitude. They are to some extent limited by the number of possible identity constructions made available by different local discourses. In general, middle managers are primarily subjected to two often opposite streams of discourses: one originating from superiors and the other from subordinates. This prompts them to choose, in any particular situation, between seeing themselves as the arm of the employer (acting upon the discourses that stem from the superiors) or

seeing themselves as consultative leaders, which seems to be a position that puts more emphasis on trying to support the subordinates in a way that brings out the best of them. According to Jackall (1988) the majority of managers choose the former.

The leadership style of the CEO is strongly evangelical and charismatic, and we argue that this, together with a discursive strategy of discrediting the past (of public sector education), acts as a means of disciplining the individual school managers through regulating their managerial identities. But the choice of viewing themselves as the agents of superior managers can mean different things in different organizations. In the case of SchoolCo two dominant subject positions for school heads to identify with were described and explored; that of being profit making businesswo(men) and that of advocating a radical pedagogy with the purpose of changing the Swedish school system.

These two subject positions had a major impact on the school heads in terms of what to focus on and how to do their work at their particular units. More to the point, as learning can be seen as occurring in daily practices (Lave and Wenger, 1991), the choice of taking on (or refusing) these subject positions had a major impact upon possible learning trajectories. If one chooses not to take them on, one would risk dismissal, as one school head experienced. If one does choose to take on these subject positions, one would expect resistance from many teachers as well as from some parents (customers), which in turn led in many cases to (even more) loneliness and conflict (Wenglén, 2005).

Interestingly, we can talk of overt attempts to regulate the identities of the school heads. They are conscious of the will of the CEO to make them think in a particular way – and it does not make them feel any sense of loathing about this. The CEO is open to the idea of his managers learning to "ask the question in the right way". The aim of the meeting was explicit, that is to "between us as managers create a common, clear and transparent position on human resource issues" and the surprising result of the exercise was that "the issues of hours of duty and salaries should be replaced by the issues of assignments, opportunities and job satisfaction". Here we can see an explicit attempt at both agenda setting and the management of meaning, that is, the exercise of power (Huzzard, 2004). The aim is for managers to learn about or from new things and pose the "right" questions. Certain questions should be foregrounded over others. Problems are not solved through negotiating with one's counterpart from their questions, rather they should be tackled by reformulating the questions. The managers should learn to think in the "right" way and employees should be responded to by the

school head herself setting the agenda and getting them to understand the problem from a leadership perspective.

To be sure, attempts at resistance can be discerned but on the whole the school heads sound as if they are conforming. They know that they (at least officially) have to share the company's formal values and understand the operations as formulated by the CEO otherwise they would not fit in or be welcome. They have to submit to the required subject positions. This is also clearly stated by top management and is something running throughout the entire organization.

Managerial learning processes can, though, be triggered by many different experiences. Our argument is based on and limited by managerial learning processes that stem from identity regulation attempts from top management. These attempts are logically based upon certain intentions of the top management. In our case we argue that the meetings illustrate how top management addresses and puts forward the need for school heads to be "profit makers" and "advocates of a radical pedagogy". More to the point, the case illustrates how these two discourses can be seen, from a top management point of view, as appropriate subject positions for the heads of school to identify with.

These identity regulation attempts are performed through social interaction in a particular context. In other words, the appropriate subject positions are transmitted through the meetings, i.e. through social interaction. One way of interpreting this is that a learning process[1] involves taking part (cf Lave and Wenger, 1991). But heads of schools are not passive consumers of muscular discourse (Alvesson and Kärreman, 2000). An experience leads to a need for the school heads to make sense of that experience. It calls for some reflection over what was said and meant.

This process of sensemaking is grounded in a self-identity (Weick, 1995), but does not necessarily involve any identity work. It is about creating some kind of subjective interpretation of the experience. It is only if the result of the sensemaking is identity provoking, that a process of identity work is called for. In other words sensemaking processes that stem from identity regulation attempts may trigger identity work. But if the sensemaking is not identity provoking, the "old" self-identity is sustained. But if the sensemaking triggers identity work this would lead to attempts to defend, modify or radically change the conception of who I am, who I would like to be, who I can be etc.

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[1] When we write about learning processes we refer to the individual school head. In other words we are exploring the relationship between identity regulation and managerial learning from the perspective of the school head.

The result of the identity work can lead to many different identity constructions leading to different ambitions at the next meeting (or even before). It may for example lead to exit, voice or loyalty (Hirschman, 1970). In other words, the appropriate subject positions that are put forward by the top management, limits the number of available subject positions for the manager to take on. Broadly speaking, these managers had to choose among the following subject positions: 1) to take on the "appropriate" subject position (with satisfaction or for the good of loyalty); 2) to take on the same position but voicing some thoughts and doubts (this did not happen in this particular case); 3) not taking on the position and voicing doubts; 4) exit (which one school head chose in this particular case).

7 Conclusions

In exploring emergent themes in the field of learning, we have developed in this paper a frame of reference illustrating how the relationship between identity regulation and (managerial) learning can be understood. Moreover, we argue that managerial learning involves processes that can be seen as choosing among subject positions and that although these are circumscribed by processes of identity regulation, there are nonetheless opportunities for exercising agency in terms of Hirschman's well established framework of exit, loyalty and voice.

The process of managerial learning is primarily about identity work (Wenglén, 2005). Part of that work is related to identity regulation attempts by senior management (Alvesson and Willmott, 2002). This identity regulation is manifested in and transmitted through discourses that limit the number of available subject positions within a particular community of practice. These (micro) discourses force middle managers to choose between fitting in with the desired identities or finding paths of resistance. Middle managers can either go with the flow, which might mean that they after some time find that their personal sense of morality has corroded (Jackall, 1988). Or they can choose a resistant subject position, which might lead to conflict or even dismissal (Wenglén, 2005). More to the point, middle managerial learning trajectories are defined and limited by the particular subject positions the individual manager chooses to accept and work from.

Based on a case study of management processes at a private school company in Sweden we argue that middle managerial learning is influenced by and connected to attempts of identity regulation from the CEO to regulate the self-identities of the school heads. This is mainly undertaken discursively, we argue, through the construction of subject positions that the school heads are expected to invest in: in this case the profit

maker and the advocate of a radical pedagogy. These attempts lead to intensive bouts of identity work among the participants. What are they (becoming) part of? Which community of practice (organizational sub-culture) are they on their way to adapting or subordinating themselves to? What really are the intentions of the CEO? For one of the school heads these meetings led to a feeling of losing the plot (Sims, 2003; Thomas and Linstead, 2002). Is the CEO a product of the culture, a society changers or a seductive businessman? The choice of either submitting to or refusing these subject positions has a major impact on possible learning trajectories for the school heads. Not least because the chosen subject position (self identity) has, in turn, a major impact on future sensemaking.

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