

## SOURCES AND DYNAMICS OF GROUP-LEVEL LEARNING DISTORTIONS

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### ABSTRACT

This study contributes to the literature on learning across organizational levels by modeling the role of social connectivity in shaping the micro-practices of new group members. Our core argument is that, because social context prompts, shapes, or terminates habitual routines, and systematically alters the cost-benefit consequences of breaking them, how newcomers perceive their roles and the emotional norms of the group influences the quality of their contributions to collective learning. The proposed theoretical framework begins to explain when and why micro-practices can inhibit or distort group learning. We suggest that tightening perceptions of role boundaries and amplifying perceived emotional dissonance selectively constrains collective learning by determining how organizational routines are practiced by individual members.

### 1 LEARNING IN SOCIAL CONTEXT

Early writing on organizational learning viewed knowledge creation as an inherently social activity, with individual inquiry, understanding and practice iteratively shaped through dynamic social interactions with other actors (Argyris and Schön, 1978; Bourdieu, 1990; Dewey, 1938; Polanyi, 1966). New meanings emerge through conversations and interactions among individual learners embedded in specific material, socio-cultural and emotional settings (Brown & Duguid, 1991; Edmondson, 1999; Lave & Wenger, 1991; Thoits, 1989). Social interactions help groups construct, dismantle and reconstitute meaning in relation to critical organizational events (Oswick, Anthony, Keenoy, Mangham & Grant, 2000). Recent studies show that heterogeneous individual practices enrich or constrain collective learning (Cohen, 1991; Orlikowski, 2002), but collective learning is not reducible to the set of individual practices (Hutchins, 1991).

Studies on the socially embedded performance of organizational routines suggest that tensions and discrepancies between individual and collective learning depend, in part, on social interactions and experienced emotions (D’Adderio 2006; Hargadon & Bechky, 2006; Denrell & March, 2001; Feldman & Rafaeli, 2002). “Normal accompaniments of organized life as audiences, arousal, boredom and overload can prevent intentional efforts to construct a different response to the same situation” (Weick, 1991: 119).

This study begins to explore how selective practising of organizational routines by individual group members may come to stall, inhibit or distort collective learning

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(Antonacopoulou, 2007; Crossan, Lane & White, 1999; Hackman, 2003). Our study tackles two related questions: 1) do individuals always have the possibility to change routines as they practise them (Becker, Lazaric, Nelson & Winter, 2005)? and 2) when and why individuals’ practices may yield suboptimal learning outcomes for the collective? Prior studies suggest that individual practices vary depending on interaction scripts and workplace emotionality (Cicourel, 1981; Argyris, 2004; Feldman, 2003; Lee, Caza, Edmondson & Thomke, 2003). Both perceptions help shape the social identities of individuals at work (Ashforth & Mael, 1989; Ibarra, 1999; Ibarra, Kilduff & Tsai, 2005). They also influence the degree to which individuals choose to “personally engage, or express and employ their personal selves, and disengage, or withdraw and defend their personal selves” (Kahn, 1990: 692).

We begin with the premise that the social and emotional context of work shapes the practise of organizational routines by co-determining the repertoire of selves enacted at work (Ibarra, 1999; Brown & Starkey, 2000). We view learning primarily as a relational activity (Gherardi, Nicolini & Odella, 1998), which requires participation in social processes and relating to other people and with the context in which these social interactions take place (Elkjaer, 2005: 46). Social interaction shapes individual identities: “people interpret and enact their social identities in response to the situations in which they find themselves” (Child & Rodrigues, 2005: 537). Social interactions help explore provisional selves, negotiate possible selves, elaborate professional identities, adapt to organizational roles, and escalate or erode commitment to specific professional norms and practices (Podolny & Baron, 1997; Yost, Strube & Bailey, 1992; Ibarra et al., 2005). Because individuals enact those capabilities and competences they perceived as useful or functional, either for overcoming threatening conditions or for solidifying their membership in the group, these “performed selves” (Goffman, 1959) are selective, and highly adaptive to situational constraints and role demands. Limiting, manipulative or disparate identities can engender acts of individual resistance to organizational changes (Rodrigues, 1996), which can significantly distort the learning process. “Organizational learning therefore does not occur naturally. It requires the active management of different social identities and of the conflict these differences may entail” (Child & Rodrigues, 2005: 541). Emotionality also influences collective learning – felt and displayed emotions motivate and structure social interactions (Andrews & Delahaye, 2000; Blackler & McDonald, 2000; Callahan, 2002; Turner & Stets, 2006). Our main argument, elaborated in greater detail the next section, is that individual practising exerts a qualitatively distinct influence on group-level learning as social interactions become less bounded by role requirements (Orlikowski, 1996) and display rules engender lesser emotional dissonance (Morris & Feldman, 1996; Diefendorff & Gosserand, 2003).

### **1.1 Why Social Connections Matter**

We focus on the social connections underpinning the practising of organizational routines (Feldman, 2000; Feldman & Pentland, 2003) because “people performing organizational routines necessarily interact with other people. This essential fact requires from routine participants the ability to learn from and adapt to other people, and also establishes the reason that adaptation is necessary” (Feldman & Rafaeli, 2002: 321, our emphasis). Individuals do not automatically act as if they are a group (Weick & Roberts, 1993). Rather, they assess the actions of others and then think and act in an appropriate manner. Contact among group members provides an opportunity to enlarge or shrink one’s

perspective and range of action. The resulting web of perspectives help routine participants develop shared understanding about what actions could be taken in a specific routine and decide why some actions may be more appropriate than others (Feldman & Rafaeli, 2002). As individuals engage and practise specific routines they produce overlapping or conflicting insights. Because social connections influence both the compliant performance of routines and divergence among enacted routines (Feldman & Rafaeli, 2002), bringing social interaction norms to the foreground contributes to a better understanding of how micro-practices promote routine stability and change (Pentland & Reuter, 1994; Feldman & Pentland, 2000). Perhaps more importantly, understanding how social norms shape practise of routines helps explain why some social connections enhance individual contributions to collective learning while others inhibit it (Feldman & Rafaeli, 2002: 327).

While researchers agree on the timeliness and relevance of studying how the social context in which routines are practised influences their content and evolution (Becker et al., 2005; Cohen et al., 1996; Pentland & Feldman, 2005), empirical studies remain rare (for notable exceptions, see D’Adderio, 2006; Bechky, 2003; Hargadon & Bechky, 2006). These recent contributions illustrate how social connections can become a source of difference between routines in abstract and routines in practise (Feldman & Rafaeli, 2002; Feldman, 2004)<sup>†</sup>. Taken together, their findings show that individual engagement in mindful social interactions with members of an established group alters both the content and performance of existing organizational routines (Feldman & March, 1981; Feldman, 2003).

Our study seeks to explain how social context shapes individual practising of organizational routines by taking a closer look at the social underpinnings of individual learning in group contexts. “People’s ongoing engagement in social practices, and thus the reproduction of the knowing generated in those practices, is how they reconstitute knowledgeability over time and across contexts. [...] As people continually reconstitute their knowing over time and across contexts, they also modify their knowing as they change their practices. [...] People learn to know differently as they use whatever means, motivation and opportunity they have at hand to reflect on, experiment with, and improvise their practices” (Orlikowski, 2002: 253), our emphasis; Barrett, 1998; Weick, 1993). While improvisation and situated acting are well-established means to increase organizational innovation, learning, and change (Vera & Crossan, 2005), recent studies show that successful transfer of individual practices into collective learning is not automatic, but rather requires deliberate orchestration of human interactions (Hargadon & Bechky, 2006).

We focus on early interactions between a newcomer and an established group. Because most groups in real organizations gain members incrementally and intermittently (Feldman, 1984; Kahneman & Miller, 1986; Miller & Prentice, 1996), newcomers experience uncertainty about social interaction norms and anxiety about social acceptance (LaCoursiere, 1980; Tuckman 1965). Their perception of group norms is likely to influence whether, and how, they enact their roles (Bourdieu, 1990) and how they connect with group

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<sup>†</sup> For example, they suggest that espoused group priorities endorse a flexible social workaround when formal rules become too rigid (D’Adderio, 2006), that cross-occupational dialogue creates a common communication bandwidth which helps transform understanding across occupations (Bechky, 2003), and that individual acts of help seeking, help giving, reflective reframing and reinforcing precipitate moments of collective creativity (Hargadon & Bechky, 2006). Other studies suggest that social dynamics may distort collective learning and perpetuate suboptimal alternatives (Denrell & March, 2001).

members (Feldman & Rafaeli, 2002). However, extant research has largely focused on understanding social connections in newly formed, ad-hoc, or experimental groups (Moreland, Argote & Krishnan, 1996). Current understanding of how group context shape a newcomer’s contribution is limited, with the notable exception of the agentic socialization and feedback seeking literatures, which study why and how newcomers interpret and adjust to group norms (Chen & Klimoski, 2003; Morrison, 2002; Morrison & Bies, 1991). While our arguments can be extended to a broader range of individual-group interactions without altering our core assumptions and propositions, there are several reasons why early encounters tend to be particularly influential in whether, and how, individual actions change the collective practise of routines. First, newcomers are strongly motivated to accurately perceive and interpret norms of social interaction (Edmondson, 2002; Fiol, 1994). Secondly, upon joining a group, members are more likely to experiment with replicating or changing the existing group norms (Feldman, 2003), monitor the group’s reactions, and calibrate performance accordingly (Feldman & Rafaeli, 2002). Third, because these early interactions set a precedent for both the individual and the group, they are likely to cue future attempts at social interactions in ways that either maintain or alter existing routines.

## **2 SOCIAL CONSTRAINTS TO INDIVIDUAL PRACTICES IN GROUP SETTINGS**

We argue that perceived role boundaries and emotional dissonance co-determine how newcomers enact organizational routines when joining an established group.

### **2.1 Role Boundaries**

Individual practising depends on their perceived role boundaries. Roles engender and cement local understandings, which in part reflect differences in expertise and experience (Orr, 1990) and in part constrain the timing, frequency, direction and medium of communication (Lave & Wenger, 1991). Effective learning often requires interactions across role boundaries, but such interactions are often problematic – they require decontextualization of routines from their role-specific applications and deliberate transformation of practices at the boundaries between occupational communities (Bechky, 2003) or functional areas (Hargadon & Bechky, 2006). Because deliberate alteration of group habits is effortful and at times painful (Gersick & Hackman, 1990), roles often constrain variability in how individuals practise organizational routines.

When social interactions are bounded by specific role requirements, individuals have fewer opportunities to experiment with different approaches (Vera & Crossan, 2005). Social interaction norms often differ across occupations (Bechky, 2003), functional responsibilities in the value chain (D’Adderio, 2006), or areas of expertise (Hargadon & Bechky, 2006; Orlikowski, 1996). This brackets the range of acceptable interactions, in two ways. First, social interaction scripts bring role-based identities to the foreground. Because this imbues the affiliation with the group with greater value, an individual becomes less willing to depart from established social interaction norms and more inclined to replicate them in ways that ensure acceptance within the group. This reduces variability in the practise of organizational routines. Second, when deviance occurs, it is more likely to be systematic – group members tend to diverge in a similar direction and to a similar extent, which in turns makes adaptation of the routines more cumbersome. Such systematic

deviance at best delays the emergence of more adaptive responses (Vera & Crossan, 2005; Orlikowski, 2002) and at worse reinforces suboptimal solutions (Denrell & March, 2001).

As role boundaries become looser, and less prescriptive, perceived emotional harmony encourages greater variability in emotional display, and broader choices. Individuals are engaged, playful, open to giving and receiving suggestions (Hargadon & Bechky, 2006; Kahn, 1990). As a result, they practise more freely, and often more creatively. As roles become more scripted, in-role identities solidify, yielding greater conformity among individual learners, and lesser variance in how routines are practiced. Looser role boundaries allow greater room for individual reflection and experimentation and foster greater diversity of practices which enriches group-level learning (March, 1991).

## 2.2 Emotional Dissonance

Social connections also require emotion management (Callahan, 2002). Attendance to emotional displays and control of emotions are important parts of work roles (Hochschild, 1983) and affect individual performance at work (Pugh, 2001; Morris & Feldman, 1996)<sup>‡</sup>. Diefendorff and Gosserand (2003: 950) propose that the more specific the display rules, the lesser the individual variance in emotional expression at work. Rigid emotional displays often engender clashes between existing emotional scripts and felt emotions, that is, emotional dissonance (Hochschild, 1983; Morris & Feldman, 1996). Individuals monitor and adjust their emotional displays based on occupational standards and cues from supervisors and co-workers (Diefendorff & Richard, 2003). They also continuously compare emotional display rules with their own feelings, and engage in emotional regulation strategies to reduce detected discrepancies (Diefendorff & Gosserand, 2003). They may also choose to deviate from expressive scripts (Rafaeli & Sutton, 1987) or engage in expressive manipulation or control over their emotions (Goffman, 1967).

Emotional dissonance prompts revisions of in-role identities to bring identities in line with perceived social structure: “emotion signals how events in the situation are maintaining (or not maintaining) meanings” (Turner & Stets, 2006: 30). Symbolic interactionist theories, such as affect control theory (Burke, 1991; 1996; Heise, 1989), suggest that individuals strive to minimize incongruity between self and self-in-situation and adjust their individual expressions by monitoring others’ responses (Ibarra, 1999). They may attempt to realign their emotional expression to the situational expectations by either changing the situation or revising their identity. When individuals cannot resolve this incongruity, and perceive feedback from others as painful, they tend to engage in defensive behaviours which maintain rather than reconcile the perceived incongruence among the self and the social structure. These defensive behaviours decrease interpersonal attunement among individuals (Scheff, 1988) and engender future disruptions of social interactions (Turner, 2002). As perceived emotional dissonance increases, individuals are more likely to revise their expressions, either by presenting only identities which have been confirmed by others and

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<sup>‡</sup> Display rules refer to the publicly observable side of emotions (Ashforth & Humphrey, 1993) and “prescribe behaviours deemed necessary for effective job performance” (Diefendorff & Richard, 2003: 284). Emotional display rules are often implicit, and typically encompass demands to express positive emotions and suppress negative ones (Schaubroeck & Jones, 2000), although some occupations require the expression of negative or neutral emotions (Rafaeli & Sutton, 1987).

buffering identities which appear mismatched to the situation, or by engaging in defensive behaviours that create, or perpetuate, breaches in the social structure.

Managing emotional dissonance requires increased self-monitoring efforts (Grandey, 2000). Individuals may choose to regulate their displays “in a feedforward fashion, whereby emotion regulation strategies are used prior to the detection of discrepancies” (Diefendorff & Gosserand, 2003: 955, our emphasis). This helps individuals comply with the perceived demands of the situation. However, as specific expressions are consistently confirmed, they acquire greater salience, and may bring forth a situationally appropriate identity, while aspects of the identity associated with situationally inappropriate displays become repressed (Turner & Stets, 2006, for a review).

Perceptions of emotional dissonance determine whether individuals will enact their ‘preferred selves’ fully or partially. When individuals perceive little emotional dissonance they are more likely to express emotions freely. They do not censor or order their acceptable identities; rather, they are fully present in the situation and more open to experimentation (Vera & Crossan, 2005). When situationally-appropriate displays are internalized, that is individuals experience emotional harmony, feelings are more likely to be expressed deliberately, safely and completely – and they often enhance task-performance, e.g. by allowing the physician to concentrate on the diagnostic or eliciting payment from debtors (Rafaeli & Sutton, 1987).

As the degree of perceived emotional dissonance increases, individuals become more selective and deliberately restrictive in their emotional displays. Because they feedforward rehearsed, validated, situationally-appropriate identities, they leave little room for real-time adjustments in how they enact specific routines. When individuals experience emotional dissonance, relaxing role boundaries reduces the pressure to feedforward situationally-appropriate displays, and may even, on occasion, allow for subversive displays, to relieve some of the pressure they feel from suppressing parts of their selves at work.

Not all jobs requiring emotional labor trigger emotional dissonance (Hochschild, 1983). When individuals internalize the display rules, and are committed to extend effort towards displaying group desired emotions, individuals are more likely to willingly practise these rules (Diefendorff & Richard, 2003; Gosserand & Diefendorff, 2005). Low emotional dissonance stimulates individual practising, even in settings with high emotional demands. This variance facilitates collective learning (Feldman, 2003).

Prior studies on newcomer adaptation to new roles suggest that individuals devise, elaborate and sequentially provisional identities until their chosen professional selves conform with situational demands (Ibarra, 1999). Social context guides self-construction. Individuals observe role models to identify potential identities; they provisionally enact them and evaluate their situational fit by seeking and processing external feedback (Ibarra, 1999)<sup>§</sup>. Because individuals retain and choose to express only those identities that conform

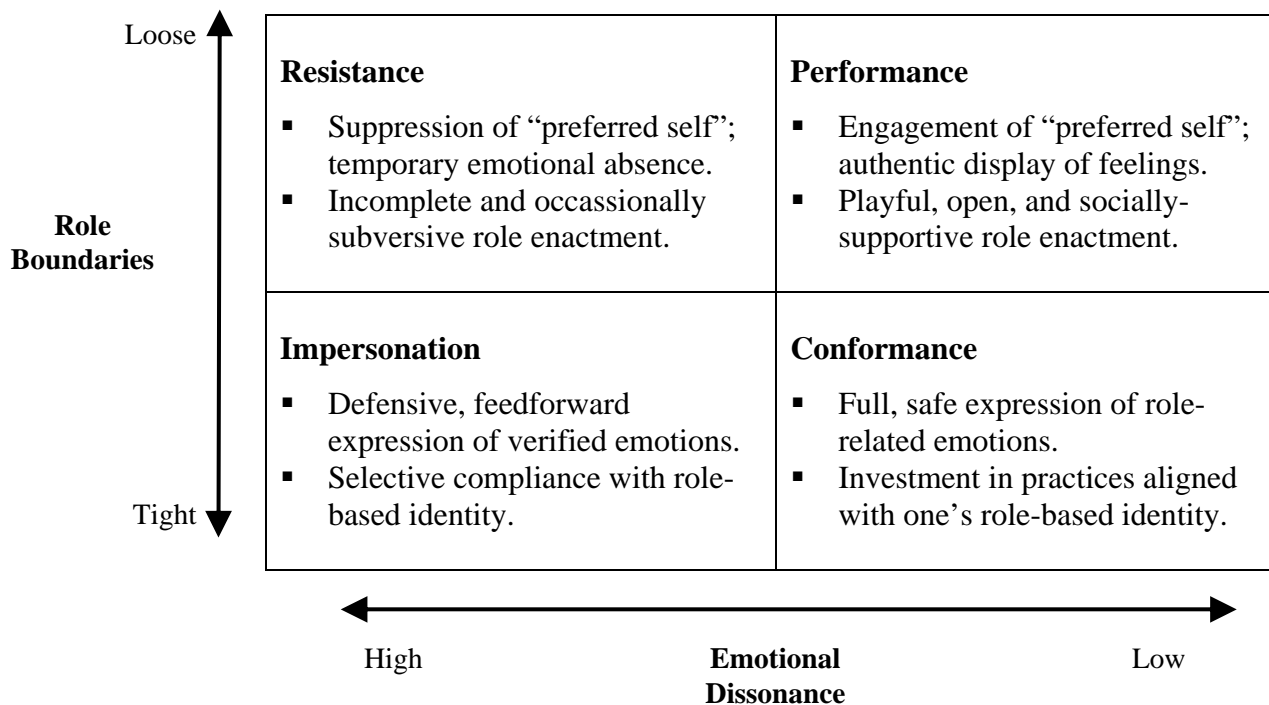
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<sup>§</sup> Our interest here is on distinctive social categorizations. These can be derived by applying simplified schemas or stereotypes, i.e. from observed category membership (Fiske & Taylor, 1991) or can be data-driven based on careful gathering and interpretation of available cues (Macrae & Bodenhausen, 2000). When individuals are motivated to be accurate in their assessment, they are more likely to act as intuitive detectives. They set out to identify relevant exemplars and engage in direct observation.

to group members’ expectations, individual members’ expressed identities, behavioural outputs, and perceptual inputs become increasingly congruent over time (Turner & Stets, 2006: 31). Individuals are more likely to control their affective expression by taking on suitable identities and avoiding unsuitable ones when they face high emotional dissonance (Burke, 1991; Heise, 1989). Selective conformity with some of the group’s emotional display norms reduces emotional dissonance but at the same time limits individual engagement in the practise of organizational routines (Kahn, 1990). Members become less likely to express their authentic self (Baxter, 1982). They may even disengage from others and uncouple from the role itself, displaying “an evacuation or suppression of their expressive and energetic selves in discharging role obligations” (Kahn, 1990: 701).

### 2.3 A Socially-Embedded Typology of Routine Practising

Norms of social interactions shape the way in which routines are practised by individuals within the group by providing parameters for role performance (Kahn, 1990) and emotional expression within the work role (Rafaeli & Sutton, 1987). The more role boundaries and emotional display rules accommodate the ‘preferred self’, the more likely they are to stimulate full and playful engagement (Kahn, 1990) and mindful practising of organizational routines (Hargadon & Bechky, 2006; Orlikowski, 2002). Our two dimensional typology, presented in Figure 1, illustrates how tightening the role boundaries or enforcing stricter emotional display rules restricts variability in individual practices. Each quadrant triggers specific learning distortions.



**Figure 1: Social Constraints to Routine Practising**

### 3 SOURCES AND EXAMPLES OF GROUP-LEVEL LEARNING DISTORTIONS

#### 3.1 Impersonation

Tight role boundaries prevent variation in individual practices – their main function is to ensure consistent, reliable replicability of well-defined routines. Fast-food servers and telemarketers often come to impersonate their roles. Because departures from this script, socially or emotionally, are discouraged and punished, individuals anticipate and comply with role prescriptions. Role boundaries are clear, and rarely trespassed.

The McDonald’s operations manual today has ten times the number of pages and weighs about four pounds. Known within the company as “the Bible”, it contains precise instructions on how various appliances should be used, how each item on the menu should look, and how employees should greet customers. [...] A McDonald’s kitchen is full of buzzers and flashing lights that tell employees what to do. [...] At the front counter, computerized cash registers issue their own commands. Once an order has been placed, buttons light up and suggest other menu lights that can be added. Workers at the counter are told to increase the size of an order by recommending special promotions, pushing dessert, pointing out the financial logic behind the purchase of a larger drink. While doing so, they are instructed to be upbeat and friendly. “Smile with a greeting and make a positive first impression,” a Burger King training manual suggests. “Show them you are GLAD TO SEE THEM. Include eye contact with the cheerful greeting.” (Schlosser, 2001: 69-70)

The computer automatically dials people throughout the United States. When somebody picks up the phone, his or her name flashes on the screen, along with the sales pitch that FutureCall’s “teleservice representative” (TSR) is supposed to make on behalf of well-known credit card companies, phone companies, and retailers. TSRs are instructed never to let someone refuse a sales pitch without being challenged. The computer screen offers a variety of potential “rebuttals”. TSRs make about fifteen “presentations” an hour, going for a sale, throwing out one rebuttal after another to avoid being shot down. About nine out of ten decline the offer, but the one person who says yes makes the whole enterprise quite profitable. Supervisors walk up and down the rows, past hundreds of identical cubicles, giving pep talks, eavesdropping on phone calls, suggesting rebuttals, and making sure none of the teenage workers is doing homework on the job. (Schlosser, 2001: 81)

As impersonated identities become more restrictive, they may motivate individuals to disengage from their work. For example, Kahn (1990: 706) provides a telling example of how binding and unattractive such impersonated identities can become to individuals enacting them:

The role I’m required to perform, sitting up here in front and smiling and typing and being friendly...it’s all bullshit, it’s just a role, and there isn’t any satisfaction in it for me. I’m more than that, and I want to be seen as a person



apart from the work I do. This eight or nine hours is a waste, damaging, I think, to my own growth and what I think about myself.

Impersonators selectively activate a small subset of role-convergent emotional displays (defensively and selectively). At Disney, impersonation comes with the job: once in, you will become whatever you were cast to be: “They have your personality waiting for you. That’s literally true: Check it at the door.” (Project on Disney, 1995: 138).

“You’ve got to keep your mouth shut. You can’t tell them your opinion. You have to do everything they say. The Disney way. Never say anything negative. Everything’s positive. There’s never a no. You never say I don’t know. If you don’t know something you find out fast, even on your own after work.” They look for someone who can follow the rules, be a team player, never rock the boat no matter what the circumstances. (Project on Disney, 1995: 123)

For the bulk of the park’s employees engaged in the repetitive, often mindless, if not idiotic tasks that together produce Disney’s magic, the putting on of happy faces is daily work. (Project on Disney, 1995: 144) One is stuck to mechanically reproducing the same commodified Disney charm: “You feel like you’re a robot after awhile. [...] but you just have to.” (Project on Disney, 1995: 125)

The extent to which Disney workers impersonate their head-costume, is an often remarked and generally praised aspects of the park. Accurate impersonations help Disney convey its magic and happiness and differentiate itself from Universal Studios. Impersonation requires employees to selectively but repeatedly put on specific identities in anticipation of their interactions on the job. Rehearsal of these identities guarantees accurate, high-fidelity replication of organizational routines on the job. In fact, Disney employees become so good at feedforwarding these specific identities that sometimes they have difficulty shaking them off as they transition back into their personal lives:

The free-floating anxiety palpable in this rambling comment – and it is the most extreme of its kind – reflects the ease with which she imagines Disney’s potential or inevitable presence in any aspect of her life, the suspicion that she could at any time do something that is “not the Disney way,” that Disney might “find out” because news of it has “popped up” somewhere. (Project on Disney, 1995: 132)

Theme park characters, airline flight attendants, and fast-food service providers provide vivid examples of impersonation (when individuals perceive their roles as highly-scripted, with differentiating requirements and tight boundaries), or resistance (when individuals perceive somewhat permeable role boundaries and occasionally rebound to their felt emotions by breaking the emotional display rules). These professions, commonly associated with emotional labor (Hochschild, 1983), often engender large gaps between felt emotions and required displays. Furthermore, non-compliance with scripted displays triggers rejection, embarrassment, often outright punishment, including job loss:

[At Disney,] “being found out of place or time or otherwise out of costume is grounds for automatic dismissal.” (Project on Disney, 1995: 118).

“If you want to keep your job, do your work, keep your mouth shut, stay by yourself”. (Project on Disney, 1995: 130)

Conformity with Disney rules and precepts is further enhanced by the use of supervisors who check on and frequently punish transgressions, such as experimentation with alternative scripts or an incorrect manner when dealing with visitors. (Bryman, 1995: 111)

The combination of acute dissonance and painful rejection in case of non-compliance with group-sanctioned emotional displays leaves individuals little choice but to alter their identities to conform to group’s expectations (Turner & Stets, 2006). Impersonation fosters congruity with well-scripted routines, but also effectively prevents individual members from contributing to collective learning:

For the park’s self-identified artists and performers, disappearing on the job is understood to be the erasure of just that creative input in the performance of tasks which either by their sheer repetition and monotony or the inanity of their production render employee contributions null. (Project on Disney, 1995: 147)

### **3.2 Resistance**

Resistance also promotes convergence with existing routines, albeit imperfectly so. Acts of resistance, in the form of rule breaking, or improvisation on the margins of well-scripted routines, do introduce variation but often in the form of inconsequential and undesirable departures from group’s expectations. Because group members are likely to repress or conceal the insight and intuition from individuals who deviate from accepted emotional display rules, they effectively buffer the group from individual learning.

When individuals perceive their role boundaries as tight, they may begrudgingly comply with role demands, like the receptionist quoted above (Kahn, 1990: 706). But is not always the case –when role occupants see some opportunity to temporarily restore a suppressed part of the self, they may also choose to enact organizational practices in ways that allow for fuller connectivity:

Most of the high school students that I met liked working at fast food restaurants. They complained that the work has boring and monotonous, but enjoyed earning money, getting away from school and parents, hanging out with friends at work, and goofing off as much as possible. Few of the kids liked working the counter or dealing with customers. They much preferred working in the kitchen, where they could talk to friends and fool around. Food fights were popular. At one Taco Bell, new employees, departing employees, and employees who were merely disliked became targets for the sour cream and guacamole guns. (Schlosser, 2001; 82)

Some Disney employees “resist”, by engaging in temporary, self-conscious rule breaking at the boundary of their organizational role – most of it is directed specifically at Disney in its corporate togs and often conceived of as sport. (Project on Disney, 1995: 127)

Depending on the leniency of leads, workers in the attractions or anyone employed to deliver scripted spiels may try to make a game out of altering the delivery or content of the spiel. (Project on Disney, 1995: 127)

Disney’s ride operators also “resist” – although they are explicitly discouraged from departing from their script and engaging in ‘ad-libs’ so that visitors can experience the very same attraction identically, temporary departures are practiced, and accepted.

As Martin Sklar describes in the official Walt Disney’s DL guidebook, “the ‘native guides’ who pilot the boats keep up a constant stream of chatter [...] all in the true spirit of adventure and fun. [...] The share [or pun to Japanese] told by the captain is an integral part of the spiel and there is no ad-libbing involved. I recall one time, however, in which the captain made a reflexive remark about his (or the spiel’s, to be more precise) share. Referring to the head-hunters from which the boat was just saved, the spiel goes: “their way of life in the jungle is very irresponsible”... This is not a very good pun. (Raz, 2000: 80-81)

While such rule-breaking is suggestive of a short disengagement from one’s scripted role (and rehearsed identity), such temporary emotional absences punctuate a general suppression of one’s preferred self while ‘in the role’. Rule-breaking itself illustrates the disconnect between the individual and the group (Scheff, 1988), and disrupt normal interactions (Turner, 2002), yet deviance from expected scripts does not engender collective insight. Thus, while both impersonation and resistance stall group learning, learning barriers originate with the individual in the former case and with the group in the latter. When individuals resist, they enact organizational routines selectively, bracketing portions that they feel need revision, but fail to propose or validate the needed routine updates.

### **3.3 Conformance**

When emotional dissonance is low, but roles are tightly bounded, individuals “conform” with perceived situational demands – individuals prefer to re-enact stable and established routines but avoid risky or novel alternatives (Denrell & March, 2001: 534). Individuals feel safe to question, discuss, and reflect on correctable errors or incremental improvements, as long as adjustments in the practise of organizational routines do not challenge the group’s shared-beliefs. Conformance engenders variance in individual practices but typically yields only small and gradual departures from existing organizational routines. Thus, individual contributions stimulate group-level exploitative learning (Argyris & Schön, 1978; Crossan et al., 1999; March, 1991).

Perceptions of tight role boundaries can also stimulate individuals to practise group-specific routines in ways that reinforce and reaffirm their identities as members of a valued group. For example, at Southwest Airlines:

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Effective coordination requires frequent, timely, problem-solving communication carried out through relationship of shared goals, shared knowledge, and mutual respect. [...] With strong relationships, employees embrace rather than reject their connections with one another, enabling them to coordinate more effectively with each other. Shared goals motivate employees to move beyond what is best for their own narrow area of responsibility and act with regard for the overall work process. Shared knowledge among employees regarding how their tasks are related to other tasks enables them to act with regard for the overall work process. Respect for the work of others encourages employees to value the contributions of others and to consider the impact of their actions on others, further reinforcing the inclination to act with regard for the overall work process. (Gittell, 2003: 35)

Overarching goals structure collective action in ways that allow individuals to collaborate effectively across roles, by simultaneously respecting the boundaries of their roles, and temporarily bypass them to enact their holistic individuality on the job:

Strong working relationships can serve to overcome the alienation created by the division of labor by creating more holistic, social identities in place of the more partial and fragmented identities that lead people to reject their connections with others. (Gittell, 2003: 42)

Southwest Airlines is also an example of conformance in that the company has an open, stimulating, and caring social context, which encourages and respects individual contributions.

Managers from different business areas spoke knowledgeably about issues beyond the expertise suggested by their titles, and they repeatedly built upon one another’s thoughts. It was like stepping into an ongoing conversation in which these managers had been engaged for many years. As Colleen Barrett pointed out at the start of the meeting: “Titles mean very little here. Most people overlap in functionality. You would not get an accurate impression of Southwest from interviewing us individually about our areas of functional expertise.” (Gittell, 2003: 71)

“Everyone knows exactly what to do... Each part has a great relationship with the rest... These are no secrets. Every part is just as important as the rest. The lavs included. Everyone knows what everyone else is doing.” (Gittell, 2003: 32)

Respect for the work of others encourages employees to value the contributions of others, to consider the impact of their actions on others, to act with regard for the overall work process, and maintain caring, positive relationships with other employees.

“The main thing is that everybody cares. We work in so many different areas but it doesn’t matter. It’s true from the top to the last one hired ... Sometimes my friends ask me, why do you like to work at Southwest? I feel like a dork, but it’s because everybody cares.” (Gittell, 2003: 30)

Employees tend to treat each other with a great deal of respect. A Southwest manager of ramp and operations explained: “There’s a code, a way you respond to every individual who works for Southwest. The easiest way to get in trouble here is to offend another employee. We need people to respond favorably. It promotes good working relationships.” (Gittell, 2003: 34)

This coherent set of organizational practices maintains and fosters interpersonal connections. At Southwest, people think of their jobs not as a set of discrete tasks, but instead as linked to broader processes involving people in other functional areas. (Gittell, 2003: 197).

Noteworthy, conforming individuals can also accentuate deviant group norms. Take, for example, Enron’s traders:

The traders were smart, by and large, and they were good at what they did. But their insular culture had a dangerous edge; not only was it self-righteous, but it could never see beyond its own value system. The culture that evolved allowed the traders to justify making money in ways companies should never countenance. Most companies with trading desks don’t allow the traders’ ethos to trump all other values, and they don’t allow the traders themselves to run amok. That both happened at Enron was not so much a failure of the traders but of Enron’s top management, which was supposed to keep them in check but wouldn’t – or couldn’t. (McLean & Elkind, 2003: 213)

Enron’s traders had become nearly impossible to control. Even Skilling, who used to lament that dealing with the traders, was like herding ducks.

Traders are not just right but absolutely right,” he would add. “Everything is a negotiation. If you asked them to turn left, even if they wanted to turn left, they’d say, ‘Well, how much are you going to pay me to turn left?’” Though Skilling was their boss, he seemed intimidated by them. They were like a powerful high school clique that terrorizes even the principal. “They didn’t appear menacing,” says a former executive, “but they were a mob.” (McLean & Elkind, 2003: 213)

### **3.4 Performance**

When individuals openly engage with varied scripts and combinations of routine sets, practising takes on an improvisational quality that allows for the expression of radically innovative ideas aimed at exploring creative territory, which would have been considered prohibited under more restrictive conditions (Argyris & Schön, 1978; Crossan et al., 1999). When social norms are shared and understood, and the context is “rule saturated, but not rule bound” (Vera & Crossan, 2005), the opportunity to play, experiment, and engage in a variety of interactive routines engenders wide variability in individual practices (Feldman, 2004), and often reshape the social connections themselves (Feldman & Rafaeli, 2002).

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Although rarer in practise, examples of performance are easier to find in organizational studies. The literatures on creativity (Hardadon & Bechky, 2006), improvisation (Orlikowski, 1996; Vera & Crossan, 2005), change (Bresnen, Goussevkaia & Swan, 2005), and successful organizational transformation (Orlikowski, 2002) draw important linkages between social connectivity at work and performance-enhancing revisions in organizational routines. At IDEO, for example, individual performances are stimulated through highly eclectic teams, fuzzy and shifting role boundaries, and constant immersion in test-driving and experiencing their own product. This approach works so well that “some corporations send their top people to IDEO just to open their minds” (Nussbaum, 2004: 92):

How does IDEO do it? Perhaps it is the unusual techniques it uses to energize corporate clients -- "bodystorming," "behavioral mapping," "quick and dirty prototyping," "deep dives," "unfocus groups," "shadowing," and "be your customer." [...] Corporate execs probably have the most fun simply participating in the IDEO Way, the design firm's disciplined yet wild-and-woolly five-step process that emphasizes empathy with the consumer, anything-is-possible brainstorming, visualizing solutions by creating actual prototypes, using technology to find creative solutions, and doing it all with incredible speed. Here's how it works: A company goes to IDEO with a problem. It wants a better product, service, or space -- no matter. IDEO puts together an eclectic team composed of members from the client company and its own experts who go out to observe and document the consumer experience. Often, IDEO will have top executives play the roles of their own customers. Execs from food and clothing companies shop for their own stuff in different retail stores and on the Web. Health-care managers get care in different hospitals. Wireless providers use their own -- and competing -- services. (Nussbaum, 2004: 92)

IDEO is an extreme example of authentic enactment of loosely bounded roles in ways that foster individual creativity, and help harness it into moments of creative insight (Hargadon & Bechky, 2006, for a complete analysis and comparison with other performing groups).

Starbucks is another example of performance. Starbucks has created a social structure that allows partners to infuse themselves into their work, so that they can inspire customers and co-workers to new standards of performance. Partners have the freedom to find what works best for them – and their leaders emphasize, train, and encourage a respect for the discretion and uniqueness of their staff.

“At Starbucks, this discretion comes in the form of giving priority to being welcome, demonstrating generally what being welcoming looks like, refreshing that image, and then letting people make that concept their own as they bring it into the lives of those they serve.” (Michelli, 2007: 24-25)

Starbucks’ five principles of being welcoming, genuine, considerate, knowledgeable and involved, illustrate how authentic emotional expression and loose role boundaries encourage wide variance in individual performances in their work roles. This variance promotes routine adaptation and precipitates collective learning. It helps instantiate and experiment with specific practices. It also promotes social connections and inspires new organizational routines (Feldman & Rafaeli, 2002).

Starbucks partners are encouraged to use their own unique style to produce inviting encounters and to treat people in a way that leaves everyone feeling unique and special (Michelli, 2007: 24). Being genuine is paramount to delivering the Starbucks Experience. But how does Starbucks motivate its employees to invest more of themselves, and get others to invest more of themselves, in the process of interpersonal connection and discovery? (Michelli, 2007: 30).

“Instead of overwhelming folks with reams of minutiae and too-rigid instructions, [Starbucks] gives guiding principles of the environments they hope to create and legendary service they strive to provide.[...] No manager can tell employees how to bring out their individuality while functioning effectively in accordance with the business’s priorities; no scripted customer service approach can make this happen. [...] It’s through leadership’s guidance, encouragement, and acceptance of their uniqueness that partners generate new ways to excel. (Michelli, 2007: 20-23)

As in the case of conformance, groups can “perform” unethically, even at an organization’s peril. The head of Enron’s trading group, Belden “wasn’t trying to break the rules; he was simply performing an experiment.” (McLean & Elkind, 2003: 269):

Clever traders could find loopholes in the thousand or so pages of rules and game the system in much the same way Andy Fastow’s team gamed the accounting rules. For instance: what would happen if a trader sold energy to the state for the next day but scheduled it in such a way that the electricity couldn’t possibly be delivered? What would a move like that do to the price of electricity? That’s what Belden wondered and what he set out to learn with his little hands-on experiment. (McLean & Elkind, 2003: 264)

In sum, the proposed typology illustrates the joint influence of perceived sociality and emotionality at work in determining how individuals enact organizational practices and how their practising facilitates, stalls, or distorts group-level learning. Loosening or tightening perceptions of role boundaries, or reducing or amplifying perceived emotional dissonance, help group create a dynamic micro-balance of individual practices conducive to stability of fit routines and adjustment of unfit, outdated, or suboptimal ones. Next we note key barriers to collective learning for each quadrant, and discuss when, and how, organizations may deliberately overcome some of these limitations by inducing upward or lateral movements.

### **3.5 Limitations of Individual Practices**

In each quadrant, individual practices engender important learning limitations. Authentic performance engenders practising and sustains collective exploration – but it may fail to produce, or replicate, a stable basis of high-fidelity routines. Variance in individual practices, while adaptive, does not necessarily translate into collective learning. Individual experimentation may yield radically innovative ideas that explore territory which would remain out-of-bounds in more restrictive contexts. But individuals may fail to obtain group acceptance for novel ideas, or groups of performing individuals may select out a majority of the proposed routine changes. Impersonation conserves and perpetuates existing

routines, but fails to refresh them. It is also often associated with stress, burn-out, and reduced employee well-being. Resistance, signals needed revisions to repertoires of organizational routines, yet fails to complete them, and may erode prior learning by selectively editing out relevant segments of organizational routines. Conformance enables incremental adjustment in routines, yet may cause groups to miss out on opportunities for radical or systematic change. Conformance may also motivate routine changes which yield immediate benefits to the individual, even at a long-term cost to the group.

#### **4 DYNAMICS OF INDIVIDUAL PRACTICES AND GROUP-LEVEL LEARNING DISTORTIONS**

Our typology speaks to how individuals perceive social context – and how these perceptions, in turn, come to systematically pattern collective learning. Two words of caution are warranted. First, two distinct individuals can have divergent perceptions of the same job, depending on their background, expectations, and psychological and emotional availability (Kahn, 1990), and on how they weight different sources of influence (Diefendorff & Gosserand, 2003).

For example, an employee switching from performing highly taxing emotional labor (Hochschild, 1983) through impersonation at a traditional airlines to Southwest’s relational, caring, and convergent approach may over-read the context as one inducing performance rather than conformance. The newcomer may engage in authentic expression and role improvisation, and gradually converge towards conformance. The opposite transition may lead to perceptions of unbearable impersonation – even self-liberating attempts to temporarily escape the pressures of the role through acts of resistance. Differences in individual perceptions of social connections at work introduce some degree of variability in their performance. However, recruiting and selection practices, as well as early socialization practices are likely to restrict this normal variability – especially when the group seeks highly consistent emotional displays or unerring task execution. This may happen either through rapid acceptance of group norms, or quitting. In many cases, differences in individual perception upon entry are neither random nor wide, and they tend to be reconciled relatively quickly. The more sudden the achieved convergence in perceptions, the smaller the potential adjustments in organizational practices (March, 1991).

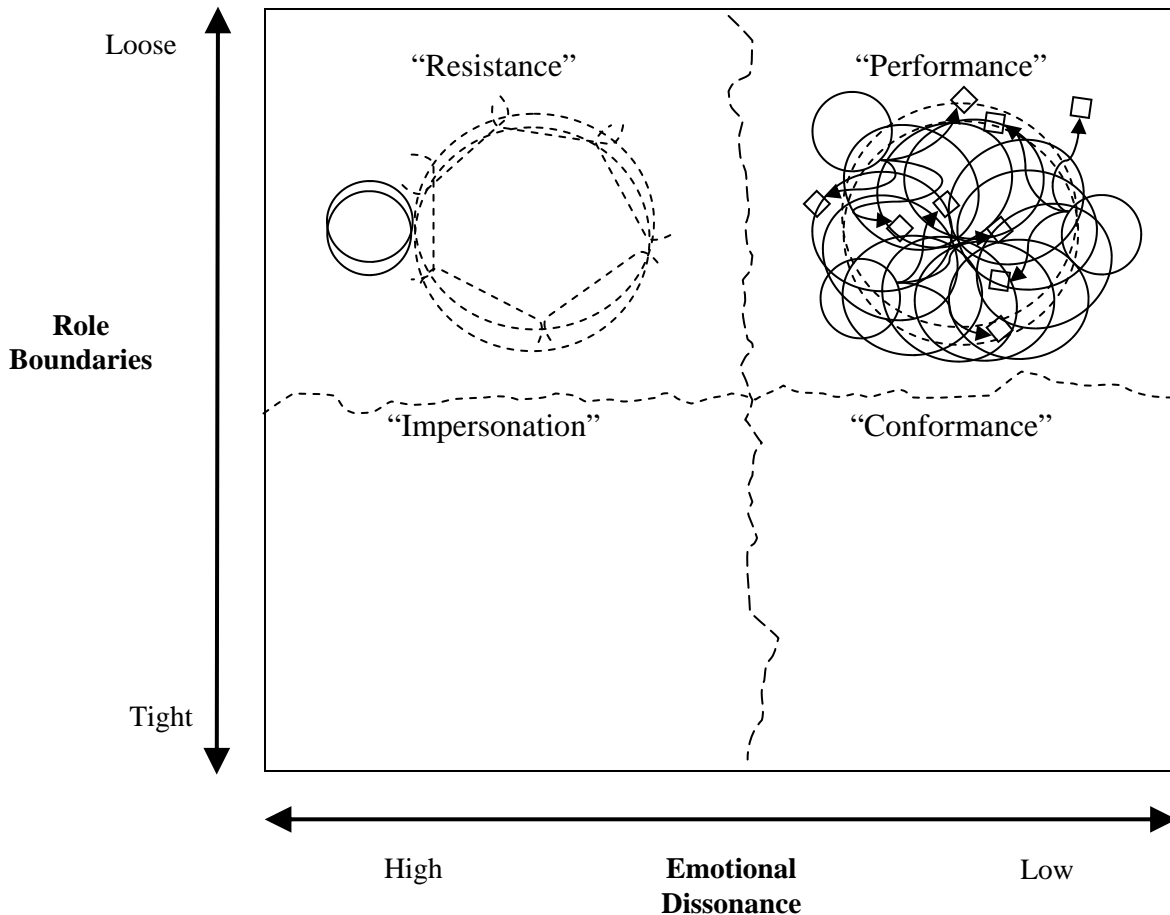
Second, organizations can, and often do, influence individual’s perceptions of social context. IDEO employees come to seek self-differentiation and expect to interact with interesting, eclectic, at times eccentric individuals; and they push their own displays to stimulate and engage themselves and their teams. Southwest Airlines emphasize relational practices – caring, respect and coordination; individuals come to anticipate, and expect, that others will look after their best interest to maximize collective gain, just as much as former Enron traders came to expect the pursuit of individual gain, even at the expense of their colleagues in other departments. Disney performers, bill collectors, fast-food servers, or telemarketers can synchronize perceptions of what is appropriate – they often obey, and disobey, together. In each of these cases, the social context is unambiguously defined for individual participants, often in ways that enforce and validate shared perceptions of the role. This increases functionality – but only under ordinary conditions. Crises and sudden environmental jolts may increase routine rigidity (Gilbert, 2005); new opportunities may go undetected or unexplored because they do not align neatly with expected practices.



Changes in display rules, either in response to external events like September 11 (Driver, 2003) or internal change (Carr, 2001) may render prior practices inappropriate – either overly lax or excessively restrictive.

But can groups reconfigure individual practices? We argue that groups often do so indirectly, by adjusting the social context in response to these events. Changes in social context help individual participants re-assess and re-calibrate role constraints and emotionality. They react to detected changes by adjusting their individual practises either to become more convergent with, or more divergent from, existing routines. Although generally adaptive, such individual adjustments may be sluggish, insufficient, even destabilizing. Explicit attention to the social context in which individuals practise organizational routines helps explain why some groups benefit from broader, fresher individual insights, which others don't.

Figure 2 illustrates how groups can deliberately manage transitions across the four quadrants.



\*Individual identities are represented as small circles; established group identities appear as large dotted circles.

**Figure 2: Dynamics of Individual Practices and Groups-Level Learning Distortions\***

These dynamics yield several unexpected insights. First, we observe significant commonalities between resistance and performance. In both cases, individuals make peripheral contributions – organizations that can surface and harness resistant practices help reduce their perceived dissonance and engender more genuine displays. The gains in collective learning are two-fold. Acts of resistance help uncover misfit routines – acts of performance both experiment with solutions to adapt them, and enlist others’ insights.

Similarly, while impersonation and conformance are felt quite differently by employees, groups can deliberately shift between impersonation and conformance. This reliable practising guarantees routine stabilization (Feldman, 2003) but avoids routine rigidity (Gilbert, 2005), while deliberately enabling employees to react and, when needed, transform emotional displays in ways that enhance harmony between felt emotions and feeling rules.

Last, impersonation and performance require opposite logics of social connection. Yet groups manage to seamlessly transition between these opposite teams – for example, firefighter teams and commando units shift quickly and willingly between these states by suddenly bringing different rules of social connection to the foreground. Similarly, resistance is the organizational antonym of conformance, but the two can co-exist in ways that benefit collective learning. The aftermath of the Columbia disaster provides a case study of how groups that used to resist (by respecting tight role boundaries, even in situations that arose high levels of emotional dissonance), learn to temporarily conform and bring their unique insights to bear on a common task (Farjoun, 2005).

This study argues that attention to how social context shapes individual micro-practices in group settings is an essential, manageable, and important mechanism for facilitating group-level learning. Left unmanaged, or managed partially, groups may become adept at one form of social connectivity and trade-off potential gains in stability or adaptability. Our typology offers, we hope, insights into two important dimensions of sociality and emotionality at work which can help groups rethink, and deliberately manage, their social context in ways that induce improved collective learning and avoid the limitations and distortions inherent in each mode of relating.

## 5 DISCUSSION

Both role boundaries and the perceived fit between felt emotions and emotional display rules have been associated with important organizational outcomes, including performance and satisfaction on the job (Rafaeli & Sutton, 1987; Gosserand & Diefendorff, 2005; Morris & Feldman, 1996), creativity (Hargadon & Bechky, 2006; Orlikowski, 2002), innovation (Bechky, 2003), improvisation (Vera & Crossan, 2005), even organizational transformation (Orlikowski, 1996). But at the same time, inappropriate social connections may stall sense-making and retard strategic adjustments (Collinson & Wilson, 2006). Group habits can yield dysfunctional outcomes, and can be difficult to change or abandon (Gersick & Hackman, 1990), even in the face of specific threats (Gilbert, 2005). Role boundaries can stifle communication and adaptation (Bechky, 2003). Social affirmation may alter individuals’ work role identifications in self-serving and reinforcing ways (Ashforth & Kreiner, 1999). Strong self-monitoring and control of emotional displays can also engender culturally-patterned displays that become “exquisitely tuned to the social

situation” (Buck, Losow, Murphy & Constanzo, 1992), but in so doing may suppress spontaneous, mindful interactions and inhibit self-expression (Argote, 2006).

## 5.1 Contribution

The organizational routine literature is particularly ambivalent about the facilitating or inhibiting role of social connections in driving stability (Feldman, 2003; Gersick & Hackman, 1990) or change (Feldman & March, 1981; Feldman & Rafaeli, 2002; Pentland & Feldman, 2005). Our study seeks to resolve these tensions by developing a systematic framework for understanding the separate and joint effects of emotional dissonance and role boundaries on whether, when, and how, individuals practise organizational routines.

Our core argument is that, because social context prompts, shapes, or terminates habitual routines (Gersick & Hackman, 1990), and systematically alters the cost-benefit consequences of breaking them (Feldman & March, 1981; Denrell & March, 2001), how individuals perceive the social connectivity and emotionality of the group influences the quantity, quality, and frequency of their contributions to group learning. We thus bring social context to the foreground to discuss how social norms at work may systematically change variability in how individuals practise organizational routines – simply put, we explore the micro-practices that determine when and how social context imprints, constrains, or distorts group-level learning.

The typology developed in this study contributes by making social context salient and exploring how individual perceptions of sociality and emotionality come to create predictable patterns, handicaps, even distortions in group-level learning. Attention to the social context in which interactions take place offer new dimensions of mindfulness (Weick & Sutcliffe, 2006) and deliberate sense-making during the practise of routines (Feldman, 2003), advocates the importance of better understanding how informal routines come to shape organizational practices (D’Adderio, 2006), and suggest new levers for overcoming routine rigidity (Gilbert, 2005).

Revisiting how social connections shape learning across levels of analysis through distinct practising of organizational routines offers a bridge between the original contributors to the study of organizational learning (Dewey, 1938) and more recent proponents of situated learning (Orlikowski, 1996; 2002; Orr, 1990). Early writings emphasized the role of cross-level, iterative processes in the design, completion, reflection and modification of action (Dewey, 1938), or the detection and correction of errors (Argyris & Schön, 1978; Crossan et al., 1999 for a review) – but often assumed that social norms enhance individuals’ motivation and ability to engage in these processes. The situated learning literature, on the other hand, explained how physical, material and social contexts drive or block collective learning, but has only recently begun to systematically explore how micro social relations shape individual practices (Contu & Willmott, 2003; Orlikowski, 2002). Effective learning hinges on ensuring sufficient variance in how individuals practise organizational routines (March, 1991). The social context in which practices occur can systematically reduce this variance, for example by discouraging authentic, energetic enactment of roles (Kahn, 1990) or by encouraging conformance with preset scripts (Hochschild, 1983) at the expense of reflection, experimentation, and improvisation (Vera & Crossan, 2005). Prior research suggested that individuals monitor and react to role norms and emotional display rules, especially during early socialization (Chen & Klimoski, 2003; Morrison, 2002; Pratt &

Barnett, 1997), but we know relatively little about how individuals adjust their practise of organizational routines in response, or how selective practise may constrain collective learning. Our typology discusses the effects of two specific sets of social connection norms on the practise of organizational routines, which shape performances of individual roles within organizations (Kahn, 1990). We extend these arguments by proposing that individual perceptions of role boundaries and emotional dissonance jointly determine systematic patterns of variance in individual practices – and thus delimit the contributions of individual members to group learning.

## 5.2 Managerial Implications

Social connections can have subtle but powerful influences on the effectiveness of collective learning. Individuals assess social norms carefully upon joining an established group and continuously adjust their practices depending on the responses they receive from their group members. This study suggests that specific social interaction norms determine how authentically, openly and completely individuals choose to enact their roles within the group. Perceived emotional conflicts between the individual and the group, and rigidly specified boundaries for individual roles jointly structure and stiffen individual practices within a narrower range of practise. This leaves little room for individual reflection or experimentation, and thus little room for adjustments in existing routines and little inspiration for emergent patterns of action.

Our theoretical recommendations dovetail nicely with recent findings by Hargadon and Bechky (2006) that authentic, fluid social interactions precipitate moments of collective creativity while new, valuable insights are unlikely to emerge through tight social interactions. Creating a safe and engaging environment stimulates individuals to seek and give help, engage in reflective action, and reinforce others’ mindful practices.

Our typology suggests that, by relaxing role boundaries and/or making emotional display rules more inclusive, managers can deliberately increase variability in individual practices and thus trigger more effective adjustments in organizational routines. While tightly specified roles and strict emotional displays have their functions, and often work well in settings where organizations seek to reliably preserve existing routines, they can also seriously handicap organizations that seek to generate new solutions or adapt to changing environmental demands.

## 6 CONCLUSION

Recent research on organizational routines underscores that the evolution of routines lies at the intersection of micro and macro-practices (Feldman & Rafaeli, 2002). “Performances create and recreate the understandings while understandings constrain and enable the performances” (Feldman, 2003: 729). Individuals construe, alter, and reconstruct routines through informal interactions with their group members (Pentland & Feldman, 2005 our emphasis). Our study examines the role of social connection processes in the evolution of organizational routines (Feldman & Rafaeli, 2002). We suggest that combinations of perceived role-based norms and dissonant emotional displays help explain when individuals are more likely to engage in micro-practices leading to adaptive routines (Becker et al., 2005). We also show that when social interactions are guided by role-specific norms and by emotional display rules that engender high dissonance, they cause restrictions in individual practising which can distort rather than enhance group-level learning.

Taking a closer look at the role- emotion-based dimensionality of social connections brings forth the importance of the social context in which learning interactions take place. Ensuring ‘just enough’ variance in individual performance of organizational routines necessitates permeable role boundaries which allow, even encourage, participants to take different perspectives on their own performance and prevents excessive identification with a highly scripted role. It also requires an emotionally harmonious context, where individuals are not unduly constrained by emotional display rules and can express a relatively broad range of felt emotions (Rafaeli & Sutton, 1987). Departures from these conditions may cause learning distortions, either by significantly restricting the range of individual performances or by promoting selective performances which perpetuate suboptimal routines (Denrell & March, 2001).

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