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**The role of operations managers in translating management ideas and practices between firms**

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## The role of operations managers in translating management ideas and practices between firms

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## The role of operations managers in translating management ideas and practices between firms

The operations improvement literature is found to focus on the adoption of relatively stable, monolithic external management ideas, neglecting the processes by which such ideas and associated practices are identified in source organisations and changed before and during adoption. The notion of translation is used to analyse the way SME managers assimilate practices observed in larger firms during a management development programme. A model of the micro-practices of operations managers during translation is developed. The five micro-practices are: navigating distance; identifying and categorising ideas; interacting with peers; persevering based on reassurance; re-embedding practices. The findings point to the importance of understanding that managers, especially in SMEs, are active in selecting and adapting parts of systemic improvement approaches such as lean, rather than simply choosing and adopting them wholesale. They also underline the importance of peer networking in the translation process. Senior managers who want to adopt management ideas must take account of translation in their strategies. Policy-makers who advocate and evaluate the use of well-known management ideas must also be aware that translation may mean that many useful practices are adopted, even if the adopting firms no longer explicitly espouse the overarching management idea of which these practices are a part.

Keywords: operations improvement; operations managers; practices; translation; SME

### 1. Introduction

The operations function has long been a focus for the introduction of ideas and practices from external sources. Notable examples of such management ideas are MRP, TQM, Just-in-Time, lean and six sigma. As each of these has emerged, operations management (OM) scholars have explored the internal logic of the idea and associated practices, and examined implementation challenges and performance outcomes (Boaden 1997; Shrivastava, Mohanty, and Lakhe 2006; Negrão, Godinho Filho, and Marodin 2017). Some proponents of such ideas have claimed them to be universally applicable, for example Schonberger (1986) in respect

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3 of World Class Manufacturing and Womack et al. (1990) in respect of lean manufacturing.  
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5 More recent research has argued that a contingency logic is more appropriate, i.e. that  
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7 contextual and other factors such as firm size should determine which of the practices to  
8  
9 implement (Sousa and Voss 2008).  
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12 Whether it takes a universalist or a contingency view, however, this research all tends  
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14 to assume that there is a coherent and consistent form of the particular management idea  
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16 (TQM, lean, etc) 'out there', external to the firm, which can be brought in to the adopting  
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18 firm. The task of the operations manager is, according to the OM contingency view, to decide  
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20 whether the idea fits and then, if it does, to manage the adoption process; taking a more  
21  
22 universalist view, the task is centred mainly on adoption.  
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26 In this paper, rather than treating the ideas and practices as existing in some  
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28 disembodied way, external to the firm, we take the view that they exist in the activities that  
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30 are situated in other, real-life, 'flesh and blood' organisations with whom operations  
31  
32 managers interact. As such, we focus on the relationship between the operations manager and  
33  
34 the source of the ideas and practices, rather than his or her role in implementing them in the  
35  
36 recipient organisation, once they have been selected. Our purpose in this paper then, is to  
37  
38 understand how operations managers engaged in operations improvement assimilate what  
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40 they see and experience in other organisations. We use the concept of 'translation' of ideas  
41  
42 (Czarniawska and Joerges 1996) to explore this. Our empirical setting is a management  
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44 development programme that provides SME managers who have overall operations  
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46 responsibility with various structured opportunities to engage with larger firms. By joining  
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48 the SME managers on visits to the large firms, then qualitatively examining the managers'  
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50 responses to them, we develop a rich understanding of the managers' roles and practices in  
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52 translating ideas from one organisation to another.  
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3 SMEs are chosen for theoretical, methodological and policy reasons. Theoretically,  
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5 SMEs are thought to be the main beneficiaries of so-called spillover effects, whereby  
6  
7 technological and organisational advances made by large, leading, ‘frontier’ firms provide  
8  
9 some of the means and incentives for smaller, less advanced firms to improve (Andrews,  
10  
11 Criscuolo, and Gal 2016)<sup>1</sup>. Methodologically, studying SMEs that have one main operations  
12  
13 manager, rather than larger firms with more diffused responsibilities, allows more focussed  
14  
15 insight into the way operations managers translate practices from other firms. In terms of  
16  
17 policy, governments in the UK and in many other countries are preoccupied with the  
18  
19 improvement of productivity (OECD 2015). Since SMEs constitute 99% of firms in many  
20  
21 developed economies, improving SME productivity is essential to this. In the UK, recent  
22  
23 policy analyses have pointed to a ‘long tail’ of low productivity SMEs (e.g. House of  
24  
25 Commons 2018), and apply influential evidence that management practices are an important  
26  
27 determinant of SME productivity (Bloom and Van Reenen 2010) and that, more generally,  
28  
29 management intervention does indeed make a difference to performance (Bloom et al. 2013).  
30  
31 Our principal contributions are to show that operations managers are active translators of  
32  
33 management ideas and practices from outside their organisations, and to identify five  
34  
35 important translation micro-practices that they use in the translation process. We also show  
36  
37 that the function and expertise of operations managers makes them uniquely well placed to be  
38  
39 active translators of external management ideas and practices. This extends the OM  
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41 discipline’s conception of the role of operations managers in introducing external ideas and  
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43 practices, beyond the literature that emphasises operations managers’ role in selecting  
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45 management ideas to fit their organisation’s contingencies (Sousa and Voss 2008) or that  
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58 <sup>1</sup> Such a process has been characterised as ‘diffusion’ in, for example, recent OECD analyses: in what  
59 follows, we explore alternative ways of conceptualising the transfer of practices between firms.  
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3 identifies more general ‘critical success factors’ for implementation of ideas (e.g. Wali,  
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5  
6 Deshmukh, and Gupta 2003) in OM.

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8 The paper is organised as follows. In the next section, we introduce the main  
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10 theoretical background, including the central concept of translation. After outlining the  
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12 method, we set out and analyse the main findings, structured according to five translation  
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14 micro-practices of operations managers. We then discuss the main theoretical, practice and  
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16 policy points emerging from the analysis, before concluding.  
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## 21 **2. Theoretical background**

### 22 ***2.1 Management ideas - terminology***

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25 We will use the term ‘management idea’ (Sturdy et al. 2019) to refer to a consciously  
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27 constructed and labelled set of principles and methods, intended to improve performance in a  
28  
29 particular area of organisational activity: examples include TQM, lean and six sigma. Although  
30  
31 their preferred term is ‘management concept’, Benders & Verlaar (2003: 757) use a similar  
32  
33 definition ‘a more or less coherent, prescriptive vision on (aspects of) organization design’.  
34  
35 Paralleling Sturdy et al. (2019), we will use ‘practices’ to refer to subsidiary components of  
36  
37 such ideas: for example, value-stream mapping is a practice that is part of the management idea  
38  
39 of lean. In adopting this terminology, we differ from Sousa and Voss (2008) who, in their  
40  
41 seminal OM contingency theory research, use the term ‘practices’ to refer to TQM, JIT and  
42  
43 their ilk, i.e. what we are referring to in this paper as management ideas. The convention we  
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45 do use, however, fits better with the literature on translation, which forms the main theoretical  
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47 basis for the research.  
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## 2.2 Operations management ideas: from 'Japanisation' to contingency

Since the 1980s, especially in North America and Europe, a succession of management ideas such as JIT, TQM, lean and six sigma have been important in the operations improvement agenda - in practice and in the OM literature (Olhager 2002; Shrivastava, Mohanty, and Lakhe 2006; Negrão, Godinho Filho, and Marodin 2017; Zhang et al. 2015). Many of these ideas came from Japanese manufacturing in the 1980s and 1990s, when it enjoyed success in the automotive, consumer electronics and other key sectors. Initially, the OM literature often framed this issue as the 'Japanisation' of western industry, and explored whether seemingly alien ideas could or should be transferred to a Western context (e.g. Voss and Robinson 1987). Then, Schonberger (1986) in relation to 'World Class Manufacturing' and Womack et al. (1990) in relation to lean argued that these ideas are universally applicable. Subsequent research examined how ideas such as these could most effectively be adopted; studies into success and failure were concerned with whether the adoption process was effectively managed (e.g. Chang and Lee 1996), rather than whether the idea was appropriate to the firm and operation in the first place. Then, OM research taking a contingency view (Sousa and Voss 2008) argued that ideas needed to be selected based on their fit with a number of characteristics such as firm size, strategic goals and 'environmental contingencies' (Ketokivi and Schroeder 2004). A recent elaboration of this view proposes taking a more holistic, integrated "organisational system" view, rather than considering each characteristic separately (Romero-Silva, Santos, and Hurtado 2018).

Although contingency-oriented research questions the appropriateness of the various ideas, it continues, like earlier research, to treat them as coherent and consistent, 'out there' in the market of ideas, waiting to be evaluated, chosen and implemented. Most of these ideas exist as sets of principles, techniques and methods promulgated by consultants and business schools; some elements may be captured in practitioner books and websites, as well as in

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3 more official sources such as the ISO 9000 series of standards for quality management (Mol,  
4 Birkinshaw, and Foss 2019). The best-known have all originated, and been practised, shaped  
5 and named in particular organisations: lean (as the Toyota Production System) at Toyota  
6 (Holweg 2007); TQM in the US military; Six Sigma at Motorola. Only then have they been  
7 re-cast as ideas that potentially have wider applicability (Morris and Lancaster 2006; Mol,  
8 Birkinshaw, and Foss 2019). For this reason, as ideas move from firm to firm, it is important  
9 to pay attention to the source firm at each step, as well as to the adopting organisation and its  
10 efforts to implement the ideas. We turn to that process in the following section.  
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### 25 ***2.3 Translation of management ideas***

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28 This section reviews alternative ways to think about the spread of ideas and practices between  
29 organisations, focussing in particular on the notion of translation. As a point of reference, it  
30 begins with perspectives that, like the OM literature summarised above, pay little attention to  
31 how the idea or practice exists: it is ‘out there’, external to the recipient firm. We then  
32 develop the discussion to take more account of the source, as well as the recipient, and the  
33 translation of ideas between the two.  
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41 At the macro level, diffusion is a dominant metaphor in the literature on the spread of  
42 ideas. This perspective draws on Rogers’ (2003) seminal work on the diffusion of  
43 innovations. Rooted in studies concerning new products and technologies, it tends to treat the  
44 innovation as unvarying as it moves from one actor to another, and emphasises the  
45 communication processes and social system by which innovations are promoted and passed  
46 on (Zhu, Tian, and Sarkis 2012). This perspective influences policy analyses: a recent OECD<sup>2</sup>  
47 study claimed that the transfer of best practices from leading ‘frontier’ firms to SMEs had  
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<sup>2</sup> Organization for Economic Cooperation and Development

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3 diminished since the global financial crash of 2008, and characterised this as a ‘broken  
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5 diffusion machine’(OECD 2015: 12)<sup>3</sup>.  
6

7  
8 Other approaches focus on the would-be adopting firm, using concepts such as  
9  
10 absorptive capacity (Cohen and Levinthal 1990) and dynamic capabilities (Teece, Pisano, and  
11  
12 Shuen 1997) to characterise a firm’s effectiveness in assimilating and using new knowledge,  
13  
14 by virtue of the firm’s existing knowledge, strategies, organisational structure and processes.  
15  
16 These characteristics are typically treated as aggregate properties of the firm, although some  
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18 analyses recognise that absorptive capacity may depend on the counterpart from whom the  
19  
20 absorption is taking place (Lane and Lubatkin 1998). Even studies exploring the  
21  
22 microfoundations of absorptive capacity are still concerned with rather generalised, firm-  
23  
24 wide sub-components of the phenomenon, rather than the more concrete activities of  
25  
26 managers (Lewin, Massini, and Peeters 2011).  
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31 Although diffusion and adopting-firm perspectives differ in their emphasis, both treat  
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33 the innovation in question as relatively stable during the diffusion or adoption process. In  
34  
35 contrast, Ansari, Fiss and Zajac (2010) argue that ideas (they use the term ‘practices’) are not  
36  
37 simply adopted, but are adapted to the recipient organisation, to achieve technical, cultural  
38  
39 and political fit. The degree of adaptation is also affected by characteristics of the idea being  
40  
41 adopted or adapted: its interpretive viability (the extent to which it is open to multiple  
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43 interpretations), its divisibility (whether it can be implemented independent of scale) and its  
44  
45 complexity (Ansari, Fiss, and Zajac 2010). This approach, then, takes account of the  
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47 interaction between the idea and the recipient organisation, and the mutual adaptation that  
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49 results from this. But it does not explore the relationship between the idea and the originating  
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56 <sup>3</sup> In fact, this report mentions diffusion seven times in its one-page Foreword, which argues as  
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58 follows: “However, the gap between those global leaders and the rest has increased over time, and  
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60 especially so in the services sector. This implies that knowledge diffusion should not to be [sic] taken  
for granted. Future growth will largely depend on our ability to revive the diffusion machine, both  
within and across countries.” (OECD 2015: 3)

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3 organisation; indeed, Ansari *et al.* merely refer to ‘an external practice’ (Ansari, Fiss, and  
4 Zajac 2010: p 2010), without considering where it is performed and how the particular  
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6 originating site is implicated in the process of transfer, adoption or adaptation. In contrast,  
7  
8 some of the literature that uses the notion of translation, to which we turn now, more evenly  
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10 considers the relationship between the practice and both the originating and recipient  
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15 organisations.

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17 The seminal source on translation in this sense is Czarniawska and Joerges (1996).  
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19 Their central argument is that an idea that is deployed in a particular set of practices in one  
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21 organisation (the originating firm) has to be disembedded before it can ‘travel’ to another  
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23 organisation, where it is then re-embedded. In their review of translation, Wæraas and  
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25 Nielsen (2016) argue that this early work of Czarniawska and Joerges is particularly notable  
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27 for ‘treating disembedding and re-embedding on an equal footing’ (Wæraas and Nielsen  
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29 2016: 246). Research in other streams of translation research – and, indeed, later work by  
30  
31 Czarniawska and Joerges – gives much greater prominence to the re-embedding stage, in the  
32  
33 same way that the OM literature concentrates on adoption. Wæraas and Nielsen also note the  
34  
35 early emphasis on the brokering role of the actors in translating ideas from source to  
36  
37 recipient, and the ‘distinct semiotic processes going on in the source context before a  
38  
39 construct [idea] begins its journey....’ (Wæraas and Nielsen 2016: 248). This perspective is  
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41 thus especially well-suited to our focus on individual managers and how they assimilate ideas  
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43 encountered in other organisations.  
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49 According to Czarniawska and Joerges, the idea, once disembedded, becomes an  
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51 object – a text, image, prototype, etc – that can travel, then be given attention by the recipient  
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53 organisation, and incorporated into new or altered practices within it. Crucially, in the  
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55 process, the idea is translated, in the sense that the people receiving the object understand it in  
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57 different ways and ‘may act in different ways, letting the [object] drop, or modifying it, or  
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3 deflecting it, or betraying it, or adding to it, or appropriating it' (Latour (1984: 267), cited in  
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5 Czarniawska and Joerges (1996: 23)). Sahlin-Andersson (1996: 82-88) argues that an  
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7 important part of this is 'editing', whereby the idea is retold differently in each situation,  
8  
9 according to the particular context, in an appropriate formulation for the intended audience,  
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11 and in a way that presents a logic of causality concerning the idea's adoption and the  
12  
13 consequences thereof.  
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16  
17 The notions of attention, distance and framing are important. Attention is concerned  
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19 with why and how actors devote time, thought and effort to particular ideas, amidst the  
20  
21 myriad possibilities that face them. Many ideas are circulating 'most of the time, at least in  
22  
23 some places' (Czarniawska and Joerges 1996: 26): for example, the basic principles of  
24  
25 process improvement and employee engagement have been advocated for decades. To give  
26  
27 attention to an object, people need to be able to identify and categorise it in some way: 'we  
28  
29 cannot translate what is wholly unrecognisable' (Czarniawska and Joerges 1996: 28).  
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31 Interaction with the idea may also affect the recipient: 'we approach an idea in terms of what  
32  
33 we already know.... the act of discovery creates a new idea and new actor' (Czarniawska and  
34  
35 Joerges 1996: 28-29). Distance is important because, according to Morris and Lancaster  
36  
37 (2006: 210), greater geographical or contextual distance demands more translation, through  
38  
39 'repackaging and simplification into tools and techniques', possibly through several  
40  
41 iterations. A manager's attention and perception of distance also depends on framing. The  
42  
43 literature on framing is vast and varied (Cornelissen and Werner 2014), but a recurring  
44  
45 feature of definitions, particularly at the micro level of the individual manager, is that a frame  
46  
47 is a 'knowledge structure that directs and guides information processing'(Cornelissen and  
48  
49 Werner 2014: 184). Either as a consequence of their mental models or schemas (Prahalad and  
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51 Bettis 1986), or more deliberately for their own strategic reasons, different managers will  
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53 frame phenomena in different ways. This can determine the way a manager sees a problem  
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3 situation in her own firm, or a management idea or set of practices deployed in another. This  
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5 in turn depends on the interpretive viability (Benders and Van Veen 2001) of the idea: for  
6  
7 example, lean has sufficient interpretive viability that it could be framed as a cost-reduction  
8  
9 idea by one manager, and as a vehicle for organisational learning by another.  
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12 Attention, distance and framing are partly social phenomena. Individual managers  
13  
14 may see and identify an idea-object but, to do so, need to place it in relation to other ideas,  
15  
16 practices in their own organisation, and in the context of relationships of which they are a  
17  
18 part. More specifically, even though the principle of process improvement has been  
19  
20 circulating for decades, for any particular form of process improvement to be received and  
21  
22 translated into practice, it needs to come to the attention of and be identified by a would-be  
23  
24 recipient, then be institutionalised by being seen as relevant to a wider network of actors,  
25  
26 within and outside the organisation.  
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30 A central claim of the translation literature is that ideas are always translated, never  
31  
32 copied exactly, when they move from one context to another (Røvik 2016: 292): they exhibit  
33  
34 variation. But different authors understand the reasons for and modes of variation differently.  
35  
36 van Grinsven, Heusinkveld and Cornelissen (2016: 276-77) argue that there are two  
37  
38 dimensions of variation: the source of variation and the object of variation. Source variation  
39  
40 can arise through embeddedness, whereby an idea is made to fit its recipient context, or  
41  
42 through strategizing, which emphasises the agency of the broker in using variation  
43  
44 deliberately to achieve political outcomes in their organisation. Object variation can be either  
45  
46 representational or structural. Representational variation emphasises the changes in language  
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48 and symbols used, with the material practices remaining relatively unchanged. Structural  
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50 variation is the opposite: the material practices change, while the language and symbolism  
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52 remain stable.  
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## 2.4 *The role of the manager in translation*

Another important claim of the translation literature is that actors work on and change the ideas they encounter, rather than being passive carriers. Nevertheless, recent work has bemoaned the lack of attention paid to the micro-practices of managers as they do this (Mol, Birkinshaw, and Foss 2019; Werr and Walgenbach 2019). Røvik (2016) proposes that such a focus can be used to develop a prescriptive, instrumental theory on how managers can translate more successfully, treating the process of disembedding from the source organisation as just as important as translation to the recipient units. Huising (2016) stresses the importance of understanding how managers move between the external world of management ideas and the internal world of implementing change, and adopts an ‘inhabited’ perspective on how managers ‘exert significant influence via their choices and plans’ (Huising 2016: 385) on how externally-sourced management ideas will be re-embedded in their organisations. Huising’s emphasis on managers’ choices echoes Mantere’s (2008) reassertion of the agency of middle managers, in spite of the potentially constraining effect of their role expectations. Radaelli and Sitton-Kent (2016) focus specifically on the practices of middle managers in the translation process. Their framework gives prominence to the practices of middle managers in idea acquisition and in what they term appropriation of the translation role<sup>4</sup> (after Phillips, Sewell, and Jaynes 2008). Idea acquisition involves the accessing and merging of diverse types of knowledge, such as scientific sources, internal process knowledge, ideas from other organisations; connecting the information to others, such as senior managers, employees, peers, suppliers; and using and merging different types of enquiry e.g. formal meetings and seminars, informal chats, explorations and experiments. Appropriation of the translation role involves making sense of the idea to be translated;

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<sup>4</sup> Terminology adapted slightly from the source, to aid clarity.

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3 making sense of the context e.g. gauging the receptiveness of senior management or other  
4 staff; and building the manager's identity in relation to the translation.  
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8 Radaelli and Sitton-Kent's review also presents something of a contradiction: the  
9 influence of senior management is seen as especially important in the 'appropriation of the  
10 translation' role. This is also supported by Soltani et al. (2012), who suggest that middle  
11 managers are often forced to focus on narrower and more short-term practice improvement  
12 aspects due to the approach of senior management. And yet some of the studies reviewed  
13 (e.g. Balogun and Johnson 2004) show that middle managers undertake radical translations  
14 even in the absence of contact with senior managers (Radaelli and Sitton-Kent 2016: 319),  
15 using instead lateral contacts with peers and other employees in the translation process.  
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26 Our review, then, suggests that the notion of translation is a useful way to understand  
27 how organisations identify and use ideas for operations improvement. Furthermore, the  
28 relatively recent research on the translation micropractices of managers has potential to  
29 complement contingency-based OM research, which frames the operations manager's role as  
30 a rather abstract process of selecting among pre-defined ideas depending on high-level  
31 characteristics of the operation and firm context. None of the empirical studies on middle  
32 management that we review here relates specifically to the operations function, but they are  
33 nevertheless relevant. And not only are they relevant, they offer a way to compensate for the  
34 more general lack of treatment, in the operations management literature, of the roles and  
35 management practices of operations managers (Spring 2017). Many of the SME managers in  
36 our study are middle managers; some (especially from very small firms) are General  
37 Managers or Managing Directors, but have direct overall responsibility for operations. As  
38 such, we address the following research question:  
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56 How do operations managers identify and translate operations improvement ideas from  
57 other organisations into their own organisations?  
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### 3. Method

#### 3.1 Research Design

We chose to adopt a qualitative design, for several reasons. Since our basic starting assumption is that management ideas are translated – to the extent that they may be re-named, lose any widely recognised labels, or become substantively altered during translation – a survey-based approach using existing scales based on particular management ideas and associated terminology (such as TQM) would not allow us to identify the issues of concern. Furthermore, since we are interested in understanding a process – translation – and the practices of managers, we needed to explore qualitatively with the participants their interpretations and responses to the ideas and practices they encountered. More specifically, we followed a cohort of managers on a management development programme for SMEs, the broad theme of which was enhancing firm productivity by improving the management of people. A central feature of the programme was engagement with three large firms, all of whom were international corporations from engineering-intensive manufacturing, with revenues in the billions of Euros. The main vehicle for engagement with them was a group visit to one manufacturing site of each. These visits included presentations by the large firms' managers, site tours and observations. The participants were formed into small group 'action-learning sets', within which they discussed particular themes from the programme, including the visits. Our empirical focus was the series of large-firm visits.

The structured engagement allowed us to examine aspects of the translation process as it happened. The managers were somewhat self-selecting because their participation in the programme suggested a predisposition toward change and improvement; on the other hand, they were willing participants, with whom we had developed a level of trust and openness. As such, the unit of analysis is the manager although we do not see the translation as a

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2  
3 solitary, purely cognitive process, but a socio-technical process situated in the physical,  
4 technological, organisational and social context of both the host and recipient organisations.  
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6 We do not seek to characterise and compare individual managers but, by exploring the  
7 responses of the managers to the opportunity to engage in translation, we seek to understand  
8 common themes in their translation practices.  
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### 17 **3.2 Data collection**

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20 We conducted one-to-one, semi-structured interviews with the SME managers who  
21 participated in the management development programme. Fifteen managers were interviewed,  
22 and Table 1 provides basic information about them. Most of the participants held job titles such  
23 as Operations Manager or Operations Director; a few were general managers with a central  
24 operations responsibility. The numbers of employees in the firms ranged from 15 to over 200,  
25 with the vast majority being under 100. The interviews lasted between 25 and 60 minutes,  
26 totalling 465 minutes of audio recording. The recordings were transcribed.  
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37 We emphasised that the interviews were neither part of the management development  
38 programme nor an assessment or evaluation of performance. We used a semi-structured  
39 interview guide with 12 standard questions, and follow-up questions based on the interviewee  
40 responses. Our questions covered five key areas: 1) background and prior experience of the  
41 interviewee; 2) expectations prior to the site visits; 3) significant and interesting observations  
42 during the visits; 4) relevance of observations to interviewees' own practices and 5) peer  
43 support and mentoring. The primary data source was the interview itself but, as we usually  
44 conducted the interviews at the participants' premises, we toured and observed the premises  
45 and the activities taking place on site, where possible. We used notes from these tours as  
46 supplementary data on the relevance of observations and adoption of practices. One of the  
47 researchers also accompanied the cohort on the site visits to the large firms, to see and hear  
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what was presented and observe the participants' responses. The agendas from these visits and incidental notes taken enabled the researchers to ask appropriate interview questions.

Code	Position	Responsibility	Background	Industry	Work experience	Company size (employees)
OM1	Production manager	Operations	MSc level (technical)	Micro engineering	12 years	40
OM2	Operations director	Operations	Training courses	Manufacturer of bespoke cups	9 years	49
OM3	Manufacturing manager	Operations	Degree level (management)	Food production	12 years	216
OM4	Chief Executive	Operations	Degree level (management)	Transportation (ferry)	25 years	68
OM5	Operations manager	Operations	Degree level (technical)	Manufacturer of magnetrons	> 15 years	35
OM6	Managing director	Operations	Degree level (technical)	Software developer	14 years	45
OM7	Founder and owner	Operations	Training courses	Manufacturer of farming products	40 years	15
OM8	Production manager	Operations	no degree	Quarry	30 years	>30
OM9	Engineering manager	Operations	MEng level (technical)	Hardware developer and installer	11 years	15
OM10	Co-founder and director	Operations	Degree level (technical)	Software consultancy	> 30 years	80
OM11	Director and general manager	Operations	Degree level (unrelated)	Manufacturer of specialist insulation products	15 years	45
OM12	Operations director	Operations	MSc level (management)	Engineering company	16 years	31
OM13	Managing director	Operations	Degree level (technical)	Manufacturer of glassware	> 30 years	28
OM14	Head of Manufacturing	Operations	Degree level (technical)	Food production	> 30 years	
OM15	Operations director	Operations	no degree	Manufacturer of doors	7 years	>30

Table 1 – SME managers interviewed

### 3.3. Data analysis

We analysed the interview data using thematic analysis, which entails a rigorous process of familiarisation, coding, theme development and revision (Braun and Clarke 2006; Clarke and Braun 2017). This allowed us to identify patterns of meaning across the dataset. The analysis was undertaken manually without the support of a specialised software, which allowed us to fully immerse ourselves in the data. This was appropriate to the relatively simple data structure

1  
2  
3 (i.e. multiple interviews with people in essentially the same roles) and modest number of  
4  
5 interviews.  
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8 Overall, 435 significant statements were identified. We used open coding to identify  
9  
10 initial themes, then axial coding to identify themes that related to each other, resulting in a  
11  
12 number of ‘first order themes’, examples of which are shown in the data structure diagram in  
13  
14 Appendix 1. For example, one initial theme was ‘dispelling myths’ (i.e. SME managers’  
15  
16 realising that the large firms were often not as sophisticated as anticipated), but, as we reviewed  
17  
18 and refined themes (Braun and Clarke 2006: 91) by axial coding, in dialogue between us, this  
19  
20 eventually became part of the first order theme of ‘rationalising difference’.  
21  
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24

25 We used an abductive process (Mantere and Ketokivi 2013) drawing mainly on  
26  
27 translation theory. Other theories concerning the transfer of operations practices between firms,  
28  
29 such as diffusion, focus on firm-level phenomena and, as we have seen, treat ideas and practices  
30  
31 as unchanging: neither of these were appropriate to our data. Dubois and Gadde (2002) point  
32  
33 out that the abductive process requires iteration not only between theory and empirical data,  
34  
35 but also between the framework and the case. In our study, it became increasingly evident that  
36  
37 the operations manager was the unit of analysis (or case, in Dubois and Gadde’s term), rather  
38  
39 than, say, the firm or the management idea, and so the most appropriate theory would be one  
40  
41 that was concerned with individual managers’ roles and practices (cf Van Maanen, Sørensen,  
42  
43 and Mitchell 2007). This led us to draw more on those parts of translation theory concerned  
44  
45 with the individual manager, especially the notions of attention (Czarniawska and Joerges  
46  
47 1996), editing (Sahlin-Andersson 1996), variation (either representational or structural) (van  
48  
49 Grinsven, Heusinkveld, and Cornelissen 2016) and the appropriation of the translation role  
50  
51 (Radaelli and Sitton-Kent 2016). Continuing the example from the previous paragraph, we  
52  
53 combined the first-order theme of rationalising difference with the theoretical notion of  
54  
55 distance (Morris and Lancaster 2006), but, being concerned with the practices of managers  
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3 rather than the more generic characteristic of ‘distance’, developed the micro-practice of  
4  
5 ‘navigating distance’ (see Section 4).  
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#### 10 **4. Findings and analysis**

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12 We analyse the translation micro-practices of the SME operations managers, particularly in  
13  
14 respect of their engagement with the originating firms, i.e. the large firms they visited. We  
15  
16 identify five translation micro-practices: navigating distance, identifying and categorising  
17  
18 ideas and practices, interacting with peers, persevering based on reassurance, and re-  
19  
20 embedding of practices. In what follows, we will refer to the participants as ‘managers’ or  
21  
22 ‘SME managers’: where we wish to refer to managers from the large firms, we will make that  
23  
24 clear. We use selected illustrative quotations, indicating the respondent by number (“OM2”  
25  
26 etc.) from Table 1. When interviewees refer to the large firms by name, we anonymise these  
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28 by using ‘Corp1’, ‘Corp2’ and ‘Corp3’.  
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##### 37 **4.1 Navigating distance**

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39 Navigating distance involves simultaneously acknowledging various forms of  
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41 distance and, sometimes, seeking ways to overcome it. Managers characterise and assess the  
42  
43 distance, rationalise it (e.g. by justifying to themselves and others why certain practices  
44  
45 would or would not be appropriate for them), and then find ways to either live with it or  
46  
47 reduce it. Of necessity, it requires managers to ‘look both ways’: they need to compare the  
48  
49 contexts and practices of both the source and recipient organisations. The managers in our  
50  
51 study navigated the distance in somewhat contradictory ways. At the outset, before the site  
52  
53 visits, they perceived significant distance. Although they often knew very little about the  
54  
55 large firms, managers often anticipated that they would broadly be adopting more ‘modern’  
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3 approaches, be in some ways ‘advanced’ and innovative, and to have very different  
4  
5 challenges and problems to their own.  
6

7  
8 It’s like going to see the Queen. You don’t go in there, she’s got her tracksuit bottoms  
9  
10 on type of thing. You expect it to be really gleaming, don’t you.... [OM 5]  
11

12  
13 [Corp3], well, [Corp3], you think state-of-the-art and modern, because that’s just the  
14  
15 perception you get of a company with a name like that.... It’s just, obviously, what you  
16  
17 get in your mind. [OM15]  
18  
19

20  
21  
22 Mostly, managers’ expectations concerned technological and physical aspects, rather than  
23  
24 management. One of very few comments that did mention management issues was as  
25  
26 follows:  
27

28  
29 I was expecting to see best practice and some ideas and some new ways of thinking and  
30  
31 new ways of doing things that would inspire, hopefully, us to see how we could maybe  
32  
33 do things in our business that would change the way we work. [OM6]  
34  
35

36  
37 The managers had varied levels of experience of management ideas such as lean.  
38  
39 Many had little or none, and did not perceive them to be relevant because of the (small) size  
40  
41 of their operation or the sector they operated in. Many associated improvement with  
42  
43 digitisation, with several commenting that they could see the benefit, but saw implementation  
44  
45 as too expensive: given a ‘clean piece of paper’ [OM8], they would implement lean methods  
46  
47 and digitisation, but changing an established operation was seen as too difficult.  
48  
49

50  
51 Once they engaged with the large firms, the managers focussed less on technological  
52  
53 sophistication and more on management and organisation. Perceptions of distance remained,  
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55 but managers worked to make sense of the sources of distance, mainly in terms of business  
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3 and organisational factors, and formed views on how much they could emulate the large  
4  
5 firms' practices, given their size, resources or particular sector.  
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7  
8 ...you go to these places and think 'they've probably got it right and it's just a case of  
9  
10 how can we get towards that?' We're never going to be exactly like them because we're  
11  
12 never going to have their resources and even the money involved, we're in a very small  
13  
14 margin business and it can go very badly wrong very quickly for us if you have one bad  
15  
16 month. [OM 4]  
17  
18

19  
20 After their initial engagement with the large firms, however, many of the managers  
21  
22 perceived a greater similarity to their own firms than first anticipated. Respondents who told  
23  
24 us that they expected rather idealised, 'state-of-the-art' facilities often noted that this was not  
25  
26 what they actually encountered. For example, the respondent who likened the prospect of one  
27  
28 of the site visits to 'going to see the Queen' then commented:  
29

30  
31 You expect it to be really gleaming, don't you, and it wasn't - and I think that was  
32  
33 better, really, because we got a better feel [OM5]  
34  
35

36  
37 Several other respondents similarly felt that the lack of 'polish' and sophistication reduced  
38  
39 the distance, because it was closer to their own experience. Others saw the perceived  
40  
41 shortcomings of the large firms in a more negative light, noting poorly utilised space, an  
42  
43 apparent lack of productive activity, rather ordinary production processes, and so on.  
44  
45

46  
47 The one thing I was surprised at, at [Corp2], was the amount of empty buildings. There  
48  
49 were absolutely acres of empty buildings. You walked in a building and most of it was  
50  
51 completely empty, with just a bit of something at one end. If only I could have a  
52  
53 proportion of that? We could make such good use of it. [OM7]  
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#### 4.2 Identifying and categorising ideas and practices

Identification involves isolating particular management ideas, practices and more general principles, as candidates for further translation. It is implicitly combined with categorisation: managers form conjectures as to which ideas and practices could complement and enhance operations in their own organisations. Our managers identified a mixture of ‘material, working practices’ (cf. Morris and Lancaster 2006), and much more general, abstract principles that they had observed in the large firms. They did not, however, seek to translate or adopt integrated management ideas such as lean.

The managers referred to specific practices identified as ‘little nuggets’, or ‘little things’. For example, several of them started to use whiteboards to display production targets and outcomes, to be used in short meetings held frequently (e.g. every day or every shift), with production staff. Indeed, the set of whiteboards used at one of the large firms generated so much interest that some of the managers arranged a follow-up visit to explore them further. One of many other examples of specific practices was as follows – very precisely specified and attributed to a particular presenter at one of the large firms:

... the daily stand-ups.. (this was [names individual] actually), ‘...what have you done yesterday and what are you going to do today, and what are you stuck with?’: so that would be quite good wouldn’t it? [OM2]

Other initiatives identified included a suggestions scheme, combining targets for the number of suggestions each employee should make with small but well-publicised financial rewards.

More generally, communication was central:

So, yes, for me, the two key things that came out is communicate more and better with your staff and have a two-way bottom-up approach more in terms of ... and I know a

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2  
3 suggestions scheme is just one small part of that but we don't do an awful lot of bottom-  
4  
5 up stuff. [OM4]  
6  
7  
8

9 Since one of the researchers joined the site visits, we know that some ideas and  
10 practices featuring prominently in the visits (e.g. agile product development) did not figure in  
11 our interview data: lacking relevance and feasibility in the managers' worlds, they were  
12  
13 apparently disregarded (although some small elements of the practices were adopted). Two of  
14 the large firms demonstrated the use of shop floor production control whiteboards: in one  
15 case this was part of the Japanese-influenced '[Corp1] Production System' (complete with  
16 Japanese terminology such as 'Gemba' and 'hoshin kanri'); in the other, as part of a more  
17 general theme of 'communications'. However, the SME managers discarded the wider  
18 system and the Japanese terminology as they identified the practice (i.e. using whiteboards)  
19 for incorporation into their own operations. Similarly, the daily stand-up meetings already  
20 mentioned were abstracted from the agile product development process in which they were  
21 first encountered on the visits.  
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38 The literature on OM approaches such as JIT is critical of what is sometimes  
39 derogatorily termed 'cherry-picking' i.e. taking practices out of context without taking  
40 account of the interdependencies between them (e.g. Lillrank 1995). In some instances, such  
41 criticism may be valid e.g. in JIT manufacturing, drastically reducing batch sizes typically  
42 requires reduced changeover times through practices such as SMED<sup>5</sup>. But some practices can  
43 be 'cherry-picked': many of those evident from our data are associated with communications  
44 and engagement, rather than being structural production process issues. One of the managers  
45 exemplifies this focus on selected, relatively basic improvement ideas:  
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<sup>5</sup> Single-Minute Exchange of Dies

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3 ...it's baby steps and just picking off little nuggets of information and trying to  
4  
5 implement them. Yes, I definitely picked off one, which has led to an actual change and  
6  
7 is now a system that is in place at our work. It's very basic but I never thought of it  
8  
9 before, [OM 11]  
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14 One of our interviewees was quite explicit in adopting a cherry-picking approach:

15  
16 I love cherry-picking... I used to ride horses; I used to have four different teachers and  
17  
18 I would go to each one and I would take out what would relate to me, to make my own  
19  
20 package if you like, you know, so I've always been like that. I'll take out what relates  
21  
22 to me, what I like, and then I'll go somewhere else and do the same thing; so, yes, I'm  
23  
24 a big cherry-picker. I think if you get too focused on doing, you know, saying 'oh well  
25  
26 you know, this person's the best', you're losing out possibly on other things. [OM2]  
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31 The managers may have cherry-picked because their relatively brief engagement with the  
32  
33 large firms only allowed them to assimilate practices and principles in a piecemeal way.

34  
35 However, none of our data suggest that the managers were seeking management ideas such as  
36  
37 lean, nor did they express a desire, given more time, to implement such ideas:

38  
39 It's been noted that I've changed personally throughout the course. I think the  
40  
41 department is working better now through leading, you know, becoming a leader.  
42  
43 That's improving productivity. I've not improved productivity by lean, agile, or any  
44  
45 of the... you know. [OM9]  
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50 As well as specific practices, managers identified general principles or patterns of  
51  
52 managerial conduct that they could use and adapt. People-related issues were important, and  
53  
54 this was indeed a deliberate focus of the engagements with the large firms. The top  
55  
56 management team of one large firm was notable for its open, transparent and inspirational  
57  
58 leadership style:  
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3 “I think [Corp1], we were told it was a world-class facility. The one thing I really liked  
4 about [Corp1] was [names MD], is he the MD or CEO? Very inspirational. I think  
5 people would like to aspire to be him....You watched him, you watched his people, and  
6 all of these people were just - I’m not saying in awe, but they were all on every word.  
7  
8 They trusted what he did. [OM 14]  
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16 As well as emphasising a policy of transparency in the way they managed, this firm were also  
17 (apparently) transparent about some of their own challenges:  
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19

20 Whereas, when I went to the [Corp1] one, how open they were. The fact they did  
21 presentations and they showed us in action, it was fantastic the way they did it. They  
22 were just so open about the problems they had.... [OM12]  
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28 Some other wide-ranging aspects were more difficult for the managers to access.  
29  
30 These were sometimes associated with deep-seated facets of organisational culture and  
31 people management, aspects that were more difficult to demonstrate than practices such as  
32 visual management and particular forms of meeting or organisation structure. Two responses  
33 exemplify this interest in learning more about the management of change and coordination:  
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39 I guess what we didn't get out of it, necessarily, was how you get everybody in the  
40 company on that journey, which in somewhere the size of [Corp2] must be very, very  
41 hard.” [OM 10]  
42  
43  
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47 “I thought that was good, the cross functional teams. I’d love to know how they manage  
48 non-co-located teams though, you know; we struggle shift to shift, let alone in different  
49 countries” [OM2]  
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### 4.3 *Interacting with peers*

Interaction with peers can occur within managers' own organisations, or with equivalents in other organisations. In our case, peers from other firms provided the main opportunity, serving as sounding-boards in discussion regarding management ideas and practice to which they had all been exposed, as well as supplementary sources of ideas and practices. Managers found that they were often able to learn more from each other than from any simple 'adoption' of ideas or practices from the large firms' examples. Despite their firms being in different sectors and markets, the managers found that they often faced the same problems. Speaking about his/her fellow participants, one manager said:

...everyone is from totally diverse, different company and diverse backgrounds. But everyone, we found out on the first two days, has got exactly the same problems, and that, nine times out of ten, comes down to people problems and things, how to get the best out of your team. [OM5]

On the other hand, seeing practices in each other's very different contexts provided new insights and again inspired them to adopt 'little nuggets' for their own firm to solve similar underlying problems. These solutions were sometimes very concrete and specific, such as the direct copying of a particular administrative document format:

We had an appraisal which was 17 pages long. [name] had an appraisal for his engineers which was two pages long. I was like, 'Okay, that's the one I want.' [OM14]

The establishment and development of peer-group action learning sets, as part of the programme, helped this process of mutual learning:

Honestly, the best bit for me so far has been talking to other businesses in the fairly safe environment... [OM4]

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2  
3 Although it is difficult clearly to identify cause and effect, our data suggest that the visits to  
4 large firms influenced the topics on which peer-to-peer interaction focused. So, even though  
5 managers did not seek to directly adopt, say, a particular visual management technique from a  
6 particular large firm, the fact that they had been exposed to this during the visits led to peer-  
7 to-peer conversations on that subject. One example related to the creation of FMEA (Failure  
8 Mode and Effect Analysis) documents:  
9

10  
11 [the Corp3 manager] got out some template FMEAs and [Corp3] notes...The only  
12 unfortunate thing is, they're [Corp3] notes. They're just huge, bureaucratic things...  
13 That was part of the challenge, trying to dig down to, 'What do I actually need to do  
14 out of all that paperwork?' (...) Someone on the course mentioned they do design  
15 FMEAs, so then I have spoken to him outside the course since then and he's given me  
16 his template FMEA, which is much better. I can see it is. (...) Yes. So, between the two,  
17 the [Corp3] and his... I'm going to come up with a [names his firm] FMEA [OM 9]  
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34 This suggests that translation is not always a direct, dyadic phenomenon, but can operate  
35 through indirect processes across a wider network.  
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38  
39 The opportunity the course gave managers to reflect more was a benefit in itself. But,  
40 in a more specific way, the chance to compare perceptions of similar problems and solutions  
41 with peers enhanced exploration of new practices, and validation for experiments that the  
42 managers conducted:  
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47

48 But actually, having that time out of work gives you perspective and helps a great deal.  
49 When you're just getting these little things just dropped on you, so try this, have a look  
50 at this, think about this a different way, a lot of that was very, very good. A lot of it  
51 about the understanding other people's perceptions of the same problems was very good  
52 as well. [OM 14]  
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#### 4.4 Persevering, based on reassurance

Identifying ideas and practices, sometimes served to convince managers to continue with practices that they already had in place in their own organisations, or to persevere with new initiatives to embed ideas and practices. This results from the ‘dialogue’ between existing practices and those with potential to be added, while navigating distance and identifying ideas and practices, and from finding reassurance in what they observed, as well as through peer interaction. For the managers in our study, finding that the large firms’ facilities were not extraordinarily sophisticated did more than make them approachable and accessible: it also meant that the managers reflected in a different way on their own operations. Often, managers noted that the large firms faced problems they could easily recognise from their own operations, and often used similar practices to deal with them, which engendered more confidence in what the managers were doing within their own firms:

And coming from a smaller company, although I’ve been around a bit, a lot of people think in a smaller company, ‘Oh, we’re terrible. We don’t work well at all. We have this issue. We have that issue.’ But when you see bigger companies have got the same issue but on a gigantic scale, it’s like okay, and it makes you feel a little bit better really... [OM 5]

The managers identified several shortcomings in the larger firms’ operations. There were three dominant themes: information systems, engagement, and relative agility. In contrast to initial expectations of technological sophistication, the managers were surprised to see extensive use of paper-based information, basic spreadsheet tools and relatively basic hardware, rather than a more digitally sophisticated environment.

‘But [Corp3] use spreadsheets, so they actually use Excel to do their... They have this big touch screen, but everything was done in Excel, so it had a lag to it, because as the

1  
2  
3 data fills up, it's not really the engine you use for that type of thing. They were just  
4  
5 saying, 'Oh there's just some lag to this.' I was like, 'With web apps these days, and  
6  
7 database management, I don't understand why you're not shifting to there?' [OM12]  
8  
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10  
11 Other shortcomings identified by the managers related to engagement with both suppliers and  
12  
13 their own employees ("It felt they could do a lot more with their employee engagement" [OM  
14  
15 6]). They also noted differences in agility and innovation methods, perceiving that, due to  
16  
17 rigid structures in the large firms, even small innovations can take a long time.  
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20  
21 These insights clearly engendered increased confidence among the managers in many  
22  
23 of the initiatives and practices that they were already pursuing. In some cases, this  
24  
25 reassurance was transmitted back to their own staff:  
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28  
29 ...it's been good to go back to my team as well and say, 'Look, I've been in [Corp3]  
30  
31 and they've got exactly the same problem we've got there. I've been in to [Corp1] and  
32  
33 they're doing what we're doing. In fact, we're doing more process-driven stuff than  
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35 what they're doing,' [OM 5]  
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#### 41 ***4.5 Re-embedding of practices in SMEs***

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45 By re-embedding, we mean the incorporation of practices in the context and operations of the  
46  
47 recipient firm (consistent with the translation literature). In contrast to the managerial micro-  
48  
49 practice of persevering, based on reassurance, re-embedded entails bringing in an idea or  
50  
51 practice that is new to the operation or, in some instances, re-kindling initiatives that had  
52  
53 been abandoned. Our interviews indicate that SMEs re-embedded a range of translated  
54  
55 practices. Because we did not closely follow the re-embedding process, we mainly have  
56  
57 insights into what was re-embedded, not how. Many of the managers had begun to use  
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1  
2  
3 adapted versions of the structured communications and visual management practices that  
4  
5 were very prominent at two of the three large firms. As mentioned, these included  
6  
7 whiteboards for production control:  
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9

10 when we went on the tour in his little alcove, that was really good, there was like so  
11  
12 much information, like when you walked in it sort of hurt your eyes because there was  
13  
14 so much.... so that big empty whiteboard that you might have seen when we walked in  
15  
16 - we're going to start looking at capacity per machine on a daily basis, and how much  
17  
18 we're utilising it.... [OM2]  
19  
20  
21

22 Some of the managers documented in detail what they had observed and discussed, with a  
23  
24 view to using the ideas in future:  
25  
26

27 The productivity measurement system has changed. You've got a load of other ideas  
28  
29 and bits of information. I've got loads of little bits of notes that eventually, parts of it  
30  
31 will be used, I would hope. [OM 11]  
32  
33  
34

35 In other cases, the managers identified and related to principles such as communication and  
36  
37 transparency, but developed their own practices as a way to implement the general idea:  
38  
39

40 I think there was quite a bit on the course around communication, which is leading us  
41  
42 to change how we communicate things. So, we've brought in things like we now do a  
43  
44 full company meeting every two weeks, which is just really announcements. Then every  
45  
46 six months, we do what we call a town hall meeting... We're much more transparent  
47  
48 .....with the finances, with KPIs and basically how we're doing. So, we used to tell  
49  
50 people we were doing well, but not necessarily tell people when things weren't so good.  
51  
52 [OM6]  
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57 Alternatively, managers recognised the same purpose in practices they already used, but  
58  
59 revised them based on what they observed:  
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3 ... it's just presenting information in a really simple way. That ultimately is all that was  
4  
5 needed. I think I overcomplicated it for years. So that works nicely. [OM11]  
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9 Several managers reported that they had reenergised efforts to use particular practices in their  
10  
11 firms, encouraged by what they saw the large firms using successfully. These included  
12  
13 various forms of suggestion scheme:  
14  
15

16 One big thing is we used to have a suggestions scheme that people used to buy into,  
17  
18 and if your suggestion won then that was the one that was taken forward, etc. That was  
19  
20 kind of dropped a couple of years ago, but everybody wants to get it going again. So I  
21  
22 said, 'Okay, we'll sort it.' [OM 5]  
23  
24  
25

26 Where we do have data on the process of embedding, most accounts suggest a  
27  
28 receptivity to change:  
29  
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31

32 Then the other week, I got them together, said, "Right, we're going to introduce the  
33  
34 SQCDP [performance measures] board again. What do you want to put on it, guys?"  
35  
36 And they're like, "Oh, cool," and within the afternoon, I had graphs coming out of my  
37  
38 ears, the options....look at this. We're measuring this, and we're measuring more than  
39  
40 we need to be measuring but everyone has got the information, just don't get asked for  
41  
42 it. So it's like, oh, okay, cool. [OM5]  
43  
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48 Of course, these are the accounts of the managers implementing the changes, so may show  
49  
50 them in a positive light. But, by virtue of the context of our study in an educational programme,  
51  
52 the managers were not obliged to adopt any integrated management ideas. No-one was there to  
53  
54 'sell' or 'buy' a management idea such as lean, and there was no incentive for managers to  
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56 adopt practices that they did not want to, nor to convey an unduly positive account to us as  
57  
58 researchers.  
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#### 4.6 A framework for operations managers' micro-practices

The five micro-practices are summarised in Figure 1. The translation process sees operations managers exposed to ideas and practices in the source organisation, which have varying degrees of interpretive viability, and are presented and represented in particular ways. They are also exposed, explicitly or implicitly, to more general principles such as 'transparency'. They perceive the ideas and practices in source organisations in relation to the current and dormant practices in their own (recipient) organisation and its wider context. While we do not see the five micro-practices as strictly sequential, navigating distance and identifying ideas and practices are more prominent before and during the encounters with the source. Interacting with peers, in our setting, took place after the initial encounters, providing further perspectives on what had been observed, and supporting managers' process of reflection. Persevering and re-embedding followed, as managers decided what to retain in their operation, and what to add.

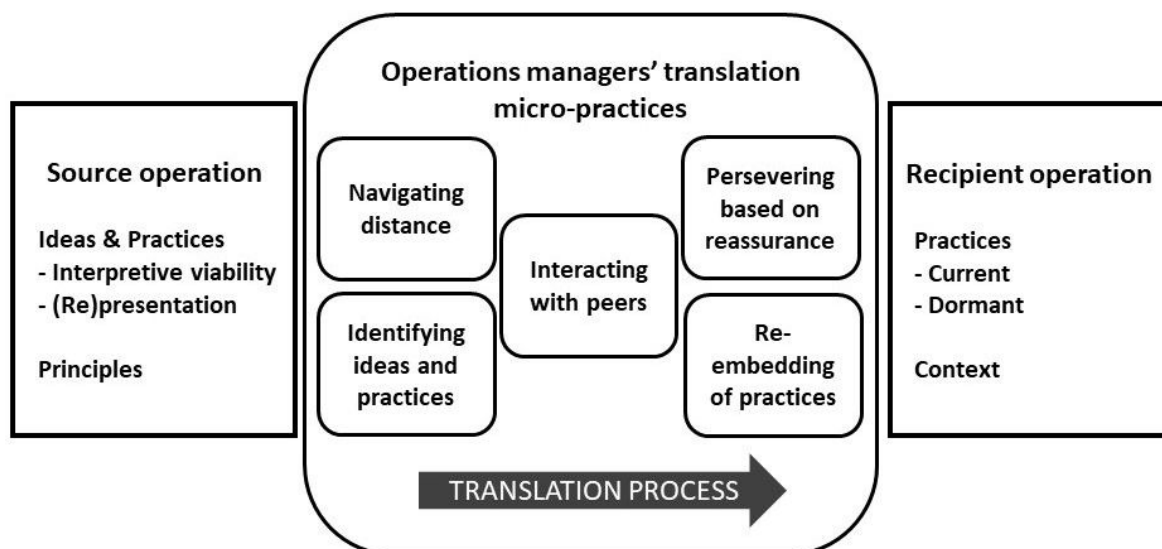


Figure 1 – A framework for operations managers' translation micro-practices

## 5. Discussion

OM contingency theory research seeks to prescribe how practices (which we have termed management ideas) should be chosen for adoption (Sousa and Voss 2008). However, noting that many organisations adopt ideas that apparently do not fit, in contingency terms, Sousa and Voss argue that OM scholars need to ‘study in more depth the process of selection of best practices’ (Sousa and Voss 2008: 711). That is, to some extent, what we have done in this paper (albeit that we would not use the term ‘selection’). In conjunction with relevant concepts from the management ideas and translation literatures, our data have allowed us to reveal some of the practices of operations managers in the translation process.

### *5.1 The operations manager as translator*

Our main concern is to understand how a translation perspective can provide alternative insights into the adoption of management ideas in an OM context. The data reveal that operations managers are much more active in the process of adoption, through their role as translators, than typically portrayed in the OM practice contingency research (Sousa and Voss 2008), or in literature that identifies critical success factors (e.g. Wali, Deshmukh, and Gupta 2003; Salaheldin 2009) for the adoption of new ideas. The latter leaves the operations manager strangely absent: many of the typical critical success factors are outside the ambit of OM altogether (e.g. ‘top management support’, ‘employee training’) or somewhat distanced from the OM substance of the ideas and practices (e.g. ‘customer orientation’). In some respects, our analysis resonates with existing translation literature that focusses on the micro-practices and roles of middle managers in translation (Radaelli and Sitton-Kent 2016), but also offers additional insights, some of which arise because we focussed on operations managers in particular.

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3 It is often operations managers who occupy what Huising (2016: 384) calls the ‘no-  
4 man’s land’ (at least as far as researchers are concerned) between ‘macro patterns of diffusion  
5 and micro processes of organisational change’. Operations managers are not full-time agents  
6 of change or internal consultants, charged with implementing management ideas by getting  
7 other people to adopt them; rather, they have to use and live with the ideas and practices that  
8 are translated. In this sense, they are not generic middle managers, but have a more specific  
9 and distinctive perspective on and relationship to many of the management ideas and  
10 practices they encounter. Furthermore, it is evident from the data that our managers are not  
11 only active translators, but also often see themselves as the object of change: they are the  
12 ones who will ‘communicate better’, improve their leadership, or emulate inspirational  
13 leaders whom they encounter, for example. This indeed is a process by which, potentially, ‘a  
14 new actor is created’ (Czarniawska and Joerges 1996) as part of translation, as well as ideas  
15 and practices being translated. (This is so in two senses – the manager may change his/her  
16 own practices as a result of the translation process, but also come to be understood by others  
17 as holding a different role or identity by virtue of being associated with the translated idea  
18 and the translation process.)

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40 The five micro-practices we identify are distinctive by virtue of being those of  
41 operations managers. So, while any middle manager might navigate distance somewhat as we  
42 have described, an operations manager has a particular understanding of his or her own firm’s  
43 operations, as a basis for both assessing and mitigating the effects of distance. In a similar  
44 way, when identifying management ideas and practices, operations managers can make  
45 judgments about which of these will be consistent with, or a valuable addition to, the existing  
46 operation. Their intimate understanding of their operation allows them to categorise what  
47 they observe, because their OM experience helps them to recognise it, and to feel able to  
48 discard elements or adapt others. Just as the inexperienced traveller may prefer a package  
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3 holiday to buying each element separately, a more general manager may feel more need to  
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5 import the management idea in its entirety, possibly simplified (Morris and Lancaster 2006),  
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7 and with less active translation. But as Sahlin-Andersson (1996: 92) puts it, ‘the ability to  
8  
9 maintain and form local practices is not mainly found in the choice between institutions  
10  
11 [ideas] but rather in the editing of models and concepts.’ Once again, this differs from the  
12  
13 account in OM practice contingency research of managers who look out at the available  
14  
15 options among management ideas, then select and adopt one (Sousa and Voss 2008). These  
16  
17 first two micro-practices, as Figure 1 suggests, all entail the operations manager moving  
18  
19 mentally back and forth between her own operation and the one she is observing or  
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21 interacting with – source or peer - comparing and evaluating differences and similarities, at  
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23 varying degrees of abstraction.  
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29 Peer interaction deserves special attention because of the particular circumstances of  
30  
31 the study. It includes facets of the appropriation of the translation role as described by Radaelli  
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33 and Sitton-Kent (2016), but was given a distinctive focus because the peers were usually other  
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35 operations managers, which affected the topics on which they exchanged views and  
36  
37 information. It is also salient that our managers interacted with peers outside their own firms.  
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39 This provides the benefits of insights from dis-interested peers, who have no concerns about  
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41 ‘turf protection’ such as may arise between peers from within the same firm (cf Balogun and  
42  
43 Johnson 2004) and could thus share their views and ideas more freely. Peer interaction also  
44  
45 allows identity work. Radaelli and Sitton-Kent (2016) see an important part of the  
46  
47 appropriation of the translation role as forming an identity in relation to the translation process  
48  
49 (see also van Grinsven, Sturdy, and Heusinkveld 2020); the literature suggests that identity  
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51 work can involve experimenting with ‘provisional selves’ (Ibarra 1999). In SMEs, managers  
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53 may have few if any peers. The external peer network in our setting nevertheless allowed that  
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55 experimentation to take place, with the business school environment providing an ‘identity  
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3 workspace' (Petriglieri and Petriglieri 2010), away from the everyday work environment.  
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5 Huising (2016) also examines peer groups, but hers are groups of peers united by the very  
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7 management idea that they seek to promulgate, BPR. In our set-up, the peer groups are united  
8  
9 around a more general set of issues: their role and identity as operations managers, productivity  
10  
11 improvement, and employee engagement.  
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15 Our novel notion of persevering, based on reassurance, also depends to some extent  
16  
17 on the particular expertise of the operations manager. Making judgments about particular  
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19 practices or aspects of performance in the large firms requires the ability to 'see the wood for  
20  
21 the trees' in the large firms' processes, as discussed above. It also requires a high level of  
22  
23 familiarity with operations within the manager's own firm to make the judgment whether  
24  
25 they are, in important respects, as good as those observed in ostensibly best-practice  
26  
27 exemplars. This suggests a relational aspect to editing and translation – managers interpreting  
28  
29 the practices and management ideas in the source organisation in relation to those already  
30  
31 adopted in their own SME. Managers in would-be recipient firms can pay attention to and  
32  
33 evaluate aspects of external practices but, rather than using them to change what they do in  
34  
35 their own firms, they use them as reference points against which to judge – and, where  
36  
37 appropriate to judge as satisfactory or superior – their own practices. In other words, the  
38  
39 translation process can result in a positive decision to stay the same. Our data also show  
40  
41 'story-telling' processes: the story that SME managers and their staff perpetuate that they as  
42  
43 an SME (relative to external, assumed-to-be-successful firms) 'are terrible...have this issue,  
44  
45 have that issue...'; or the story that the SME manager brings back from their encounter with  
46  
47 the large firm, which shows their own firm in a good light. And, in this story-telling process,  
48  
49 the managers are also forming their own identity in relation to knowledge sources and the  
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51 practices within their own firms (cf van Grinsven, Sturdy, and Heusinkveld 2020).  
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3 Because we concentrated on the operations managers' interaction with the source  
4 rather than the recipient organisations (i.e. their own), we have data on which ideas or  
5 practices were re-embedded, but less insight into the process of re-embedding. In terms of  
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10 content, most of the practices adopted seem to relate to communications with the operations  
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12  
13 staff. Communication is, of course, important for any manager. However, our data suggest  
14  
15 that the operations managers' dominant topics of communications are performance  
16  
17 measurement and reporting, and production planning & control. This echoes the view of  
18  
19 Huising (2016: 388) that '[w]hat circulates is not a canned practice or fundamental idea, "but  
20  
21 rather accounts and materializations of a certain idea or practice" (Sahlin and Wedlin, 2008: p  
22  
23 225)'. Alternatively, in some instances, quite generic ideas travelled without any concrete or  
24  
25 particularly fine-grained instantiation: to re-quote one of our interviewees, 'it's just  
26  
27 presenting information in a really simple way. That ultimately is all that was needed'. At the  
28  
29 same time, what is embedded as practice in the recipient firm may be an amalgam of 'little  
30  
31 nuggets' of more specific practices observed and assimilated.  
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### 38 ***5.2 Effective OM translation***

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40 While our main aim is to understand and theorise the translation practices of operations  
41  
42 managers, we can also begin to develop some more prescriptive insights from our study. In so  
43  
44 doing, we draw on Røvik's instrumental approach to translation, to help to understand how  
45  
46 operations managers can more effectively play their part in translation. This is partly a  
47  
48 function of the managers' translation competence, partly of the context. 'Translation  
49  
50 competence' is defined as 'the ability of translators to translate practices and ideas between  
51  
52 organizational contexts in ways that increase the probability of achieving organizational  
53  
54 ends' (Røvik 2016: 299). Røvik argues that translation competence depends on understanding  
55  
56 the management idea, knowing the recipient context, and applying the most appropriate  
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3 ‘translation rules’ (Røvik 2019). The broad rules are: copying; addition and omission; and  
4 alteration. In brief, these depend on (a) the features of the source and (b) the features of the  
5 relationship between recipient and source (Røvik 2016: 300). An effective translating agent,  
6 then, needs to read these contingencies to determine the extent to which to use different rules.  
7  
8 For example, a practice that is more explicit, less complex and less embedded should be  
9 translated using copying, which seeks to replicate the source practice. Where there is  
10 significant dissimilarity between recipient and source context, omission and addition are  
11 appropriate translation rules (this is effectively part of our notion of ‘navigating distance’).  
12 For the reasons we have discussed above, operations managers are uniquely well-placed to  
13 judge salient features of the ideas and practices, and of the source and recipient contexts,  
14 when operations-based ideas and practices are under consideration. This should come as no  
15 surprise, but such considerations are absent from the way that OM contingency theory treats  
16 these issues: it has nothing to say about the fundamental nature of the ideas or practices, nor  
17 about the relationship between the source and the recipient, only considering ‘fit’ between the  
18 management idea and recipient context. Bringing to the surface their translation micro-  
19 practices and then beginning to be more explicit about applying the translation rules may  
20 offer a way for operations managers more consistently, deliberately – and perhaps  
21 legitimately – to play effective, active roles in bringing new ideas and practices into their  
22 operations.  
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## 49 **6. Conclusions, implications and limitations**

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52 This research makes several theoretical, practitioner and policy contributions. First, we show  
53 that operations managers play a much more active role in translating management ideas and  
54 practices from outside their own firms than is portrayed in the OM practice contingency  
55 literature. Second, we identify five translation micro-practices of operations managers, which  
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3 draw on existing ideas in translation theory, but extend these and take into account the  
4 particular functional position and expertise of the operations manager. Third, we develop a  
5 simple framework (Figure 1) that captures these micro-practices, but also places them in the  
6 interactive translation process in which the operations manager engages.  
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12 The research has practical implications. Senior managers should, when seeking to  
13 implement deliberate programmes of improvement, take account of the way operations  
14 managers translate operations-oriented management ideas: apparently well-intentioned  
15 managers in our study edited ideas extensively and had little interest in the representational  
16 trappings of the ideas and practices they encountered. This may be especially important when  
17 engaging external agents of change such as consultants (cf Wright 2019) to instigate such  
18 changes. For operations managers, Røvik's proposals for an instrumental approach to  
19 translation (Røvik 2019) suggest that operations managers can develop their translation  
20 competence by understanding and applying the translation rules of copying and modification.  
21 For both senior managers and operations middle managers, our data also show the potential  
22 benefits of direct visits to exemplar sites alongside the more abstract exposure to  
23 management ideas, and the value of peer networks of some kind.  
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40 This research also has policy implications. Government initiatives to improve  
41 productivity, particularly those that seek to exploit 'spillover' or 'diffusion' effects, need to  
42 take account of the extent to which and the ways in which management practices (perhaps in  
43 contrast to technological advances) are constantly edited, adapted, re-named (Morris and  
44 Lancaster 2006) and re-contextualised as they are translated from firm to firm. As such,  
45 research and evaluation that asks – particularly in SMEs – questions such as 'do you use  
46 lean?' may be wide of the mark: firms may have adopted many of the practices that such  
47 approaches entail, but have eschewed the terminology and overarching systemic character  
48 promulgated by consultants. In other words, they may be doing a lot of lean things (those  
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3 most relevant to them) but not be aware (or care) that that is how they might be categorised  
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5 by some external observers. Policy makers should also take note of the mechanisms by which  
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7 some aspects of diffusion and spillover actually take place: ideas do not travel according to  
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9 inviolable physical laws (as the metaphors of ‘diffusion’ and ‘spillover’ might suggest), but  
10  
11 depend on the particular connections and interactions between firm and non-firm actors in a  
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13 particular industrial system, which is sometimes termed the ‘institutional architecture’  
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16  
17 (Spring et al. 2017).

18  
19 The research inevitably has limitations. The firms we investigated were SMEs. For  
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21 the reasons we set out (see also Kull et al. (2018)), SMEs are tremendously important in their  
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23 own right, but we are also aware that their size and structures may present distinctive patterns  
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25 and processes of translation, and of the operations manager’s role in it, that are not replicated  
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27 in larger firms. We chose – also for reasons explained above – to concentrate on the  
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29 disembedding or idea acquisition part of the translation process. This means that, although we  
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31 have indications of practices that the SME managers have brought into their own firms, we  
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33 do not have long-run data on how the practices were re-embedded, nor whether they actually  
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35 led to improved performance. Further research could examine the re-embedding process in  
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37 more depth, possibly using related concepts such as resourcing and issue-selling (Howard-  
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39 Grenville 2007; Wiedner, Barrett, and Oborn 2017) to understand the internal politics of  
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41 change. At the level of micro-practices, it would be interesting to use Beynon-Davies and  
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43 Lederman’s (2017) concept of second-order affordance to understand how the re-embedding  
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45 of such tools as whiteboards may lead to changes well beyond their immediate context, since  
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47 what may appear to be ‘cherry-picked’, low-level practices may, in fact, have wider  
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49 implications for organisational roles, identities, routines and processes.  
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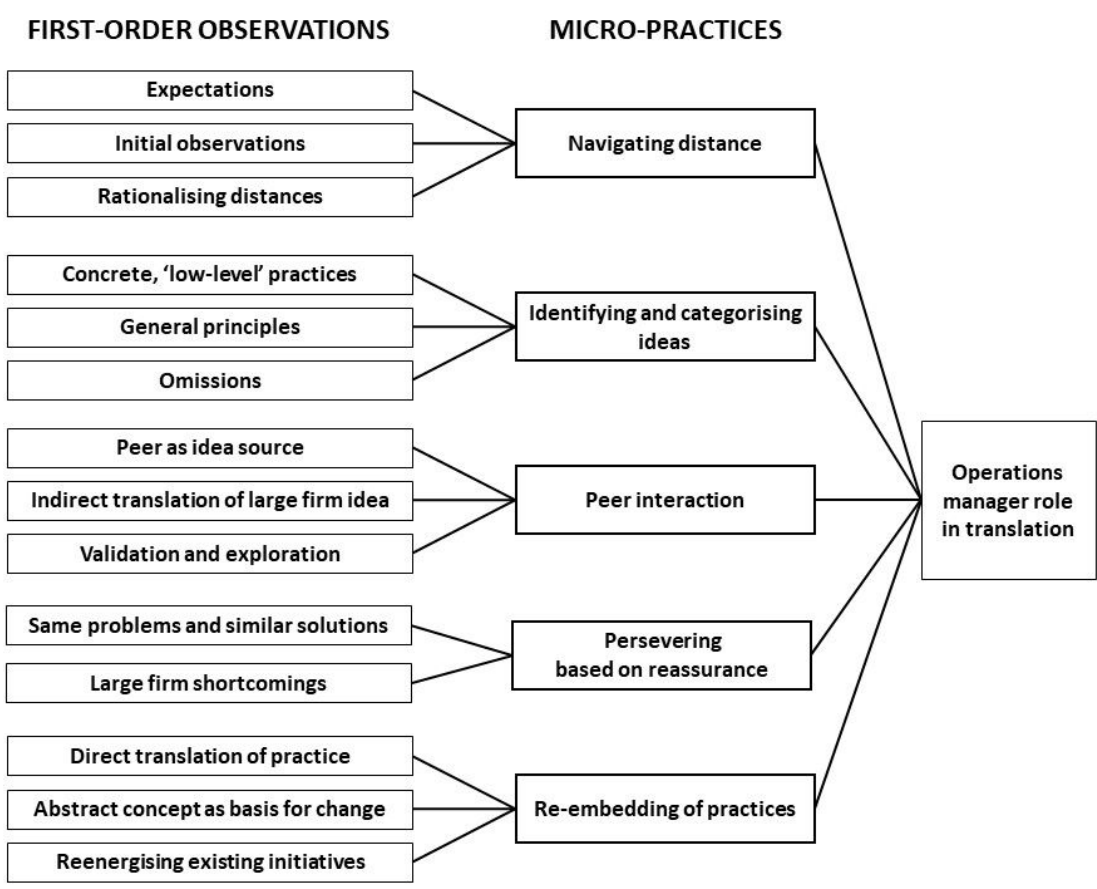
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Appendix 1 – Data structure



ew Only

Table 1 – SME manager participants who were interviewed

Code	Position	Responsibility	Background	Industry	Work experience	Company size (employees)
OM1	Production manager	Operations	MSc level (technical)	Micro engineering	12 years	40
OM2	Operations director	Operations	Training courses	Manufacturer of bespoke cups	9 years	49
OM3	Manufacturing manager	Operations	Degree level (management)	Food production	12 years	216
OM4	Chief Executive	Operations	Degree level (management)	Transportation (ferry)	25 years	68
OM5	Operations manager	Operations	Degree level (technical)	Manufacturer of magnetrons	> 15 years	35
OM6	Managing director	Operations	Degree level (technical)	Software developer	14 years	45
OM7	Founder and owner	Operations	Training courses	Manufacturer of farming products	40 years	15
OM8	Production manager	Operations	no degree	Quarry	30 years	>30
OM9	Engineering manager	Operations	MEng level (technical)	Hardware developer and installer	11 years	15
OM10	Co-founder and director	Operations	Degree level (technical)	Software consultancy	> 30 years	80
OM11	Director and general manager	Operations	Degree level (unrelated)	Manufacturer of specialist insulation products	15 years	45
OM12	Operations director	Operations	MSc level (management)	Engineering company	16 years	31
OM13	Managing director	Operations	Degree level (technical)	Manufacturer of glassware	> 30 years	28
OM14	Head of Manufacturing	Operations	Degree level (technical)	Food production	> 30 years	
OM15	Operations director	Operations	no degree	Manufacturer of doors	7 years	>30

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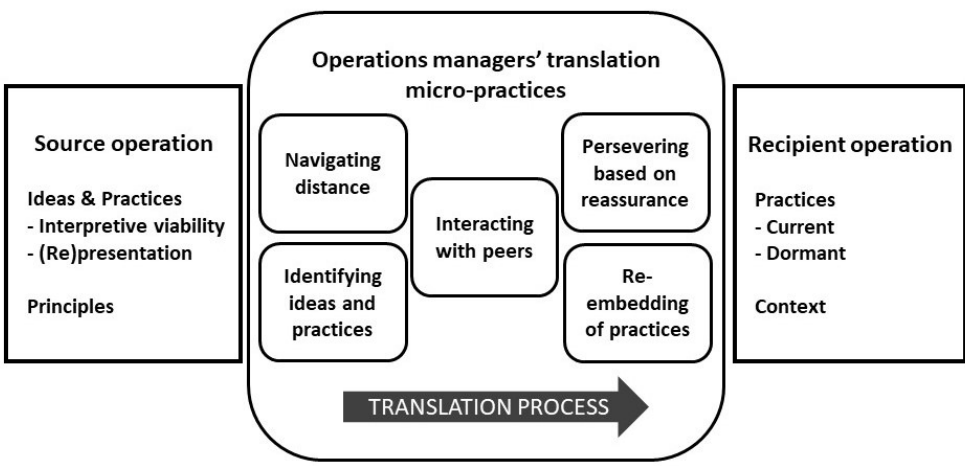
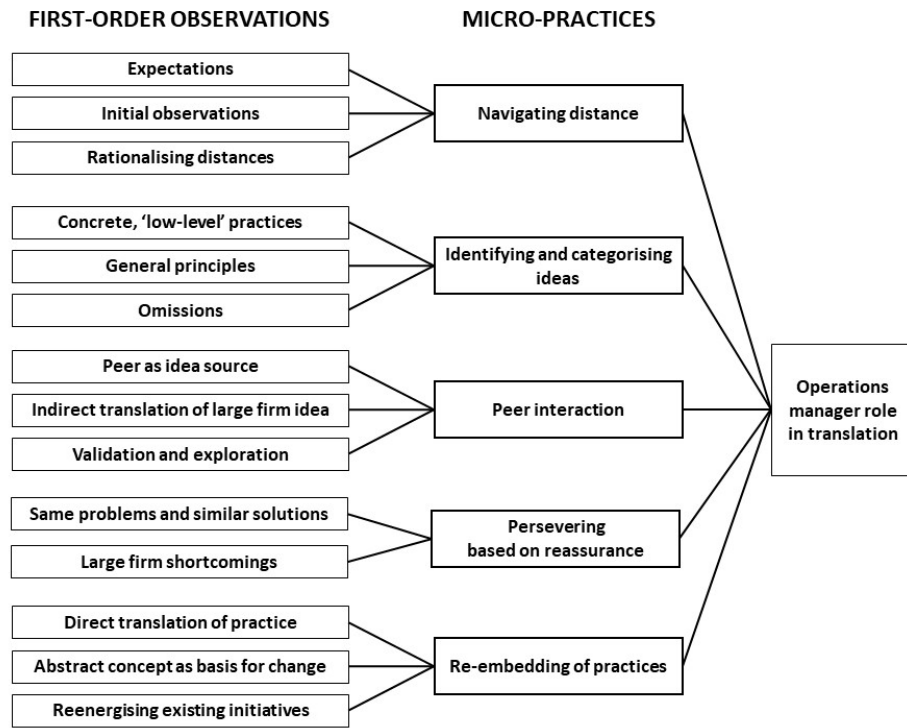


Figure 1 – A framework for operations managers' translation micro-practices

252x126mm (96 x 96 DPI)



Appendix 1 - Data structure

254x190mm (96 x 96 DPI)