Learning from members

Tools for strategic positioning and service innovation in trade unions.

Hans Björkman

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Preface

This report is submitted as a doctoral thesis at the Stockholm School of Economics. The work has been carried out within the framework of the Fenix Research Program attached to the Institute for Management of Innovation and Technology (IMIT). This research program was founded in 1997 by Chalmers University of Technology, the Stockholm School of Economics, the Institute for Management of Innovation and Technology (IMIT), AstraZeneca, Ericsson, Telia, Volvo, and the Foundation for Knowledge and Competence Development.

Our warm thanks go to the sponsors of Fenix. In particular, Sif has been of importance for this study – and not only as a contributor to its funding. Even more important has been the organization's openness and the participation in the research efforts by many employees and managers.

As usual, the author has been entirely free to conduct and present his research as he saw fit; as an expression of his own ideas.

Stockholm, April 2005

Niclas Adler
Associate Professor,
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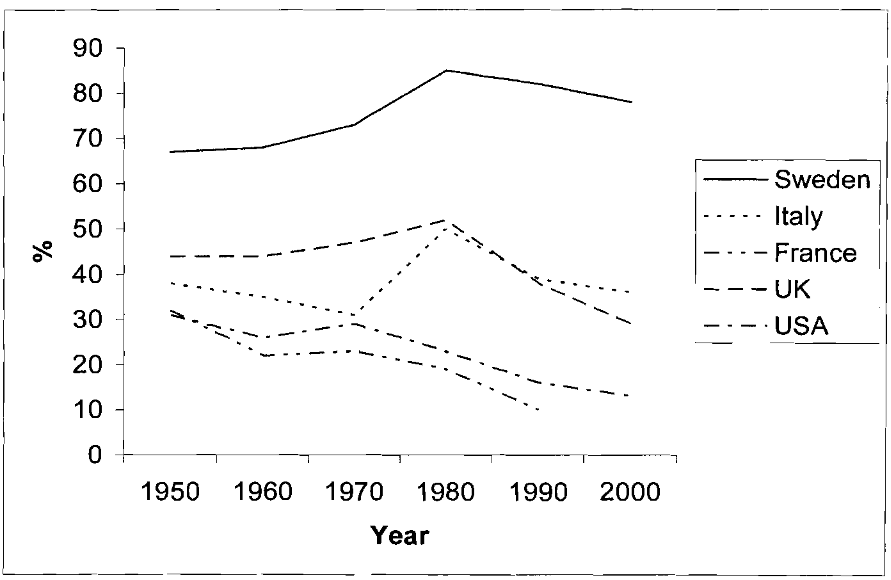
1. Market orientation: what's in it for trade unions?

Trade unions in the Western Economies are facing an enormous challenge. Ageing populations will result in losses of members. Retiring members will be replaced by fewer, but better educated, entrants to the labor market. In essence, it is a matter of life and death for unions to attract these young, well-educated workers. Trade union strategies thus need to adapt to the interests and needs of these potential members. I have had the opportunity to study and contribute to strategic renewal in a major Swedish trade union, and this thesis evaluates and sums up my experiences. It also aims to contribute to further learning and strategic renewal in the trade union context.

A purpose of trade unions is to contribute to their members' well-being in regard to predominantly work-related issues – in the Sif statutes (Sif, 2000b) expressed as contributions to the members' union, financial, social, and professional interests. Their predominant strategy for obtaining this purpose has, for a long time, been to provide services to their whole collectivity of members, mainly by representing them in negotiating and bargaining with the employers and their associations. Since their emergence in the 19th century, unions have played important roles in most Western economies. However, during the final decades of the 20th century, their importance and strength in terms of membership figures have decreased substantially in the industrialized economies (See Figure 1).

Figure 1. International unionization density trends (Kjellberg, 1983: 36-37; Kjellberg, 2002: 68).



The specific problem in the setting studied concerns the studied organization's utilization of market orientation methods and its interest in strategic renewal and the innovation of new member services. It is thus important to investigate whether and how the utilization of market orientation contributes to strategic renewal and service innovation. On a more generic level, there is a need to enhance our understanding of the effects of the utilization of market orientation methods in trade union settings and to develop research techniques contributing to such an understanding. The purpose of this thesis is to investigate whether trade unions can benefit from applying modern market orientation methods including direct member involvement.

The experiences have been drawn from in-depth studies conducted in Sif, a Swedish trade union. The setting will be more closely described in the following chapter and methodological considerations will be dealt with in Chapter 5. Sif has for many years used surveys of attitudes and preferences – targeting members – for evaluating on strategy and service portfolio levels. In addition to quantitative studies, Sif has also used qualitative approaches, such as in-depth interviews and focus groups with members and non-members, in order to develop or evaluate marketing campaigns or new ideas, services and activities. This thesis is a report from a process of strategic renewal of Sif. An essential part of that process has consisted of a research project conducted in collaboration between Sif and the Fenix program. Fenix is a research organization, located at the Chalmers University of Technology in Göteborg and Stockholm School of Economics, whose purpose is to bridge boundaries and integrate researchers from many academic disciplines into joint research projects on knowledge and business creation (Adler et al., 2003).

The study has focused on two specific tools/techniques. One quantitative and one qualitative technique have been assessed:

- The Sif Barometer, an annual membership satisfaction survey.
- The Design Dialogue Methodology, an internally developed group interview method having some resemblance to focus groups.

The techniques studied are examples of methodologies widely applied in market research. For example, estimates of focus group use in the USA exceed 200,000 such interviews a year, with a high proportion of these groups devoted to the collection of information about consumer attitudes and feelings towards products, services, and programs (Greenbaum, 1998: 169-170; Bristol and Fern, 2003).

The case study methodology chosen has enabled close investigations to be made into mechanisms, attitudes, behaviors and results related to the utilization of market orientation methods. The study has been conducted using a clear action research approach, involving change experiments on real problems in the organization (Argyris, 1993; Coghlan and Brannick, 2001). Specifically, the development of the Design Dialogue Methodology has been a mutual effort by researchers and internal service developers in the organization. My own participation as an employee of Sif and being active as co-developer and user of the market orientation methodologies under study has prompted me to adopt specific perspectives, contributing to a deep understanding and providing a platform for analyses and inferences. The applied collaborative research practices in combination with close dialogues with academic colleagues have thus contributed to richness as well as a control of the source of error inherent in being employed by the studied organization. Moreover, the intentions behind the study have not only been to describe reliable empirical facts, but also to contribute valid scientific knowledge through the creation of alternatives to the status quo that the community of practice can and wants to enact (Argyris et al., 1985).

A specific contribution of the thesis lies in its development and refinement of techniques or methods for listening to members and utilizing the knowledge attained. As will be argued, a collaborative approach within the organization and the aim of contributing knowledge that is actionable for the organization have provided excellent conditions for gaining access to data and for intervention in developmental activities.

2. Sif and the changing roles of trade unions

In this chapter, the changing roles of trade unions are first discussed. These trends are then illustrated by the case of Sif. A specific emphasis is put on describing recent developments in Sif, indicating its increased utilization of market orientation methods.

2.1 The challenge of becoming a service provider

The fact that the majority of union members in industrial countries are better-educated and performing more individually assigned tasks than before may create problems as well as opportunities for trade unions. Raised standards of living and a more individually oriented culture have also posed new challenges for trade unions. Thus, trade union interests may no longer be only a matter of responding to basic human needs (wages, safety, quality of work life etc). Trade union services may also be increasingly related to the realization of individual wants and life expectations of in terms of a combination of work and social relations.

As a result, union members are tending to become more empowered and developing resources of their own which enable them to take greater individual responsibility. As discussed in Chapter 1, we can observe decreasing unionization in the industrialized world (Kjellberg, 1983; Kjellberg, 2002). An increasing proportion of union members are tending to take their own initiative in their individual employment situation as an alternative to collective action. The decreasing level of interest in membership and active participation may be leading to a marginalization of trade unions. Adaptation to individual needs may thus be a part of a strategy for trade unions wishing to be attractive to existing members as well as potential members.

In recent years, Swedish trade unions have extended their activities. In the past, they mainly focused on improving the pay and working conditions of their members through collective action. Nowadays, however, the activities of the trade unions also cover competence development, insurance schemes and various benefit schemes involving loans, discounts and so on. This extension of trade union activities and services is not specific to Sweden. For example, in the UK, trade union services have increasingly targeted the individual member (Heery and Kelly, 1994). In a recent study of European trade unions, Dølvik and Waddington (2004) conclude that trade unions need to develop agendas that accommodate heterogeneity and the needs of individual members and particular groups – and that the interdependence between individual self-realization and collective regulation must be clearly recognized.

Trade unions are organizations in which resources are mobilized to carry out and develop activities that contribute to the welfare and well-being of their members.

The organization of union activities is still strongly influenced by traditional issues such as wage formation, employment and job security, member recruitment etc. However, these issues are to some degree dealt with in other ways than before. Simultaneously, some activities – such as participation in governmental bodies – are losing importance (Hermansson, 1999). Over the last decade, new issues, related to the development of members' competencies and skills, have been emerging on Swedish trade union agendas (Huzzard, 2000).

The perspective in this thesis is that of trade unions as service providers. Trade unions have a dual role as providers of individual services to members and as contributors of services of a more collective character to larger groups of members or to their whole membership. The more traditional role as provider of collective services – often through collective bargaining – is still very important, yet the role as providers of individual services has also become increasingly important (Paper 1). In this particular role, unions may be challenged by competing unions or other service providers (i.e. insurance companies), offering substitutes for union services. Moreover, the efficiency of trade unions as service providers may be compared to the efficiency of producers of other, but somewhat similar, services, such as banks and different kinds of governmental organizations. The legitimacy of unions may erode if service quality levels (accessibility, reliability, empathy and respect, etc) or service innovativeness become inferior to what is offered by others, i.e. if the union is perceived as being less service-minded and less forthcoming in dealing with the individual member in comparison with the manner other organizations are treating their customers.

2.2 The challenge of remaining a democratic organization

In delivering services to their members, unions face a challenge in the form of a dilemma related to their complex governance structures. Administrative efficiency in unions can be understood as the same type of managerial efficiency expected from a firm. In contrast to the firm, however, union governance additionally involves inherent political processes characterized by democratic procedures (Jonsson, 1995). Thus, a union's legitimacy does not just depend on the efficiency of its management; it has also to be governed through democratic processes. The modernization of a trade union implies the dilemma of maintaining service efficiency at the same time as nurturing democratic processes, even if these can seem to impede administrative efficiency. Seen from the perspective of democracy, the quest for efficiency may be perceived as a threat. However, if services valued by members can be achieved by market orientation methods it could be argued that, in the ideal case, such methods have contributed to an enhancement of member participation rather than being a threat to the democratic character of the union.

Arguments supporting the view that a market orientation could make a union more democratic can be found in the literature. Schumpeter (1947: 269) has suggested the following functionalistic definition of democracy: "the democratic method is that institutional arrangement for arriving at political decisions in which individuals acquire the power to decide by means of competitive struggle for the people's vote". The challenge to democratic organisations has been formulated in Michels' (1911/1949) "iron law of oligarchy": "It is organisation which gives birth to the dominion of the elected over the electors, of the mandataries over the mandators, of the delegates over the delegators. Who says organization says oligarchy." However, the iron law of oligarchy can be overturned, as demonstrated by the study by Lipset et al. (1956) of a typographical union in the US. That the members frequently vote for replacement of the incumbent leadership is, however, not the only trait that characterizes a democratic institution. According to the normative perspective of political science (Lewin, 1970) democracy also depends on the degree to which a constituency is well informed and the extent to which its members engage in debate and otherwise participate in the activities of the organization.

According to the normative school, a union will be more democratic the higher the proportion of active and participating membership it has (compare Sif, 2000; 2000a). The utilization of market orientation methods presented in this thesis may thus have two important democratic implications, possibly contributing to the suppression of oligarchic tendencies. The first is related to the "additional" membership voice articulated through utilization of market orientation methods, carrying the prospect of adding – over and above that attained from the representative system – member perspectives and values to strategic decision-making. The second is described above as market orientation as a means for the creation of services and activities that inherently enhance member participation in themselves (Paper 1: 86).

2.3 Trade unions as market actors

A definition of a market is "the course of commercial activity by which the exchange of commodities is effected" (Merriam-Webster online, 2004). This section will investigate whether trade unions can increasingly be considered as market actors.

The first trade union role as a market actor is in the labor market, representing the workers (members), who are the suppliers of labor. The aim is thus to create a strong position – approaching a monopoly supplier of labor. If agreements on employment terms, including salaries, are not reached, the union can withdraw labor by engaging in industrial action. In terms of the exchange of commodities, unions thus offer peace on the labor market in exchange for agreements. The trade union position of power is dependent on the existence of union members. The employers may in principle be free to employ whom they want, union members or non-members. When, as in many labor market areas in Sweden, some 80% of the workforce is organized, the position of the unions approaches that of a monopoly. However, the possibilities of taking industrial action are organizes approximately 50% of the organization's potential members. The remaining employees in the organization's serviceable job territory have chosen another union or have not chosen any union. Thus, Sif operates in a competitive market with a large recruitment potential. Sif can muster considerable resources both in terms of a large membership and financial strength to meet both threats and opportunities in terms of membership recruitment and retention (Huzzard, 2000). One strategic choice made by Sif has been to use segmentation approaches in order to better fulfill needs among specific groups of members. Specific information and services have thus been offered to, for example, members holding managerial positions, to engineers and technicians, and to members in the IT sector.

Sif's organizational structure is based on the direct election of trade union representatives at workplaces. Just over half of the members are organized in approximately 2 700 local branches ("clubs") at the company level throughout Sweden, while those lacking a local branch are affiliated direct to the regional Sif branch. Members not affiliated to local branches participate in the democratic system of the union through workplace representatives and specific regional organizations ("joint clubs"). The role of the elected representative is voluntary and unpaid. Elected representatives are entitled by law to perform their trade union duties during working hours. The number of local branches and the member proportion belonging to such branches have been decreasing since the beginning of the 1990s (see Paper 1:81).

There are 22 Regional Divisions (2003) which are served by 25 Regional Offices. Each Division is led by an Executive Committee consisting of elected representatives from the workplaces. The Divisions provide services, assistance, advice and support to the local branches, workplace representatives and members at the companies in the region concerned. The Regional Offices have in total around 250 employees.

At national level, the Sif Executive – elected by the Congress, held every four years – consists of 11 elected representatives and two staff representatives. The Executive is served by the Secretariat, which has slightly more than 200 employees. The Congress and the Sif Executive are responsible for decision-making on strategic issues, while the Secretariat – led by an appointed Chief Executive Officer – is responsible for the preparation and execution of strategic decisions and for activities on the operational level.

In order to show the interconnectedness between the representative system and the administrative system, two examples will be provided here. The first concerns the decision-making process related to the Action Program. The Program was discussed and adopted by the Congress, which is the decision-making body for long and medium term strategic issues. However, the process started almost two years before the Congress, when the Sif Executive appointed a project group for the development of the Action Program. This group consisted entirely of Sif staff. During the writing process, the project group met the Sif Executive several times in order to obtain input and receive feedback. The project group also had occasional meetings with the management team. This part of the process ended when the Sif Executive decided on proposals for a new Action Program, which were further discussed in the organization during the Congress preparations. Finally, the Program was adopted by the Congress.

The second example showing the interconnectedness between the representative system and the administrative system concerns a specific service of a strategic importance – income insurance for members – an insurance additional to what is governmentally funded. Even though the income insurance is a specific service (and many services are developed without any interventions from the representative system), its strategic importance has been clear. The choice to develop such a service was also in opposition to the formerly stated opinion that all income insurances should be a part of the governmentally funded welfare system. Therefore, it was important that the representative system took the strategic decisions. Offering additional income insurance had been discussed from time to time in the organization, as the governmentally funded unemployment benefit system over time has become more and more insufficient for a majority of Sif members, but the issue became more focused when a competing union and a private company started to offer such insurances. In September 2001, the Sif Executive was informed that the Secretariat had commenced investigations in order to map out the opportunities to develop an additional insurance. The secretariat reported to the Executive that market research should be used in order to establish views on the issue among the organization's members. The Executive gave the Secretariat the assignment to make further preparations on the issue and to return with a new presentation. In October, the Sif Executive decided to draw up a budget for the further research efforts on the insurance. A report was presented to the Executive in March 2001 and the formulation of a proposition could continue. In April the Executive was positive towards a proposal for additional insurance, compulsory for all Sif members and financed through a raised membership fee. Arising from the proposed increase in the membership fee, the Executive was obliged to call an extra Congress in June to ratify the proposition. Finally, the extra Congress decided on the additional income insurance.

2.5 Major aims of Sif

Responding to perceived individual and societal changes, the Sif Congress in 2000 adopted a Program of Ideas and an Action Program for the work of the union in the period up to the next Congress in 2004. The Program of Ideas resulted from the realization that changes in values and in the organizational environment were also placing new demands on the work of the trade unions. The starting point was that Sif had to continually develop and change in order to meet the demands of its members.

One of Sif's fundamental ideas is that individuals have unique needs. The Program of Ideas (Sif, 2000a) states that: "The needs of the individual are the natural starting point for all trade union work. There are times when the work of a trade union must be concerned with the needs of a single person. At other times, the union's work may be aimed at an entire workplace, or at the entire Sif membership."

The Action Program (Sif, 2000) stated that Sif would face a number of major challenges in the near future. These include the belief that technological development and globalization are leading to increasing competition for Swedish companies. The traditional industrial sector is declining, while the IT and service sectors are expanding. This in turn is leading to new forms of employment, new trade union structures and new values.

The degree of unionization in the IT, telecom and media sectors is currently relatively low. Sif has therefore been trying to develop its activities to meet member needs in such sectors. The Action Program states that Sif should particularly focus on four areas:

- The work environment
- Competence and career issues
- Pay, pensions and other forms of remuneration
- The recruitment of new members and the marketing of services for members

2.6 Sif's utilization of market orientation methods

As has been described above, an overall strategy for Sif was formulated by its Congress in 2000 and described in the Idea Program and the Action Program. The Congress decisions have thereafter been transformed into activities by the administrative system of the organization – its managers and staff. New activities and services have been developed, and market orientation methods have been more utilized than previously.

Sif provides services to its members in all the traditional union areas, such as advice on working conditions and pay, financial support in the event of unemployment and other forms of insurance in connection with illness and so on. Sif also supports its members if they become involved in disputes with their employers. These traditional services are still – in terms of utilized resources – very important. Moreover, at least some aspects of a more traditional, protective trade union role are – according to the Sif Barometer, an annual member satisfaction survey (see 7.1) – still very appreciated by members.

Perceived shifts in values among the members (Bruhn, 1999) – expressed by Congress decisions - have led to a perceived need to strengthen the position of every individual at the workplace. Sif has therefore begun working with a range of service tools. Some of these are Internet based, aimed at helping people to help themselves. Several of the Internet based tools are intended to assist competence and career development. Other services are based on face-to-face meetings, such as the coaching of individual members. This new provision is also placing new demands on the working methods of both employees and elected representatives.

A few examples of new services can be specifically mentioned:

- the formentioned specific income insurance only available for Sif members, providing additional unemployment benefits in proportion to one's individual income loss;
- "the Sif Career Center": Internet based self-assessment and career development tools, free of charge for members;
- "the Career Coach": members can, free of charge, meet a professional career advisor for a few hours;
- "the Job Chat": an Internet based platform for discussions within different interest groups in the organization, "virtual communities".

The organization has used market orientation and marketing methods in many change processes. One example is the development of a new profile, characterizing the organization and its representatives as competent, engaged, respectful, listening, and creative. The internal processes related to the implementation of the new profile resulted in a change of logo and a renaming of the organization. When the new logo was developed, focus groups were used to capture the sentiments of university students, potential members, and members in relation to different fonts and colors. The organization's name used to be Svenska Industritjänstemannaförbundet ("The Swedish Union for White-Collar Workers in Industry"), abbreviated SIF. The current name, Sif, is not an abbreviation, but a brand name. In total, the new profile aims at positioning the organization as member-orientated.

The transformation of Sif described here suggests an increased degree of market orientation, not least as the orientation towards individual needs has been strengthened. This increased market orientation is also evident given the background of what is needed to recruit new members. Thus, Sif activities and services today encompass not only the demands from current members; they also have the purpose of attracting new member groups. Sif aims at being a union for current members as well as for potential members – the organization's potential market is bigger than its membership. Although the recruitment of new members has always been important, the organization today is transforming its activities and services in order to attract members from new groups. Table 1 below shows the more important market orientation methods utilized in the organization.

Table 1. Examples of more important market orientation method utilization in Sif

Method	**Purpose**	**Frequency**
1. Qualitative methods		
Focus Groups	Diverse; pre-assessments of advertising campaigns, design of services	When needs arise, several times each year
Design Dialogue Groups	Design of new services, idea generation	When needs arise, >40 groups/ 3 years
Interviews	Deeper knowledge on prioritized areas etc, evaluations of services and activities	When needs arise
2. Quantitative methods		
Media analyses	Monitoring Sif's image in the media	Continuously, 4 reports/year
Image studies	Positioning in relation to competitors	Annually
The Sif Barometer: a member satisfaction survey	Strategic and operational evaluations	Annually
Web based membership surveys	Membership opinions before negotiation rounds	About every second year
Surveys in specific industry sectors and prioritized areas	For strategy decisions and/or policy articles in the media	When needs arise, several surveys each year
Evaluations of services and activities	Improved operations: could concern telephone response times, satisfaction with seminars etc.	Annually/continuously for many services/activities

The changes in trade union focus will be described below in terms of offerings and provisions of collective and individual services. The description is based upon Paper 1 (75-81).

2.7 Collective services – still a core activity for Sif

Collective services differ from individual services as they target all members or groups of members. Hence, the service provision process is different, as it does not necessarily involve the individual member. Among the more important kinds of collective services, the following could be mentioned:

- Negotiations and collective agreements at European, national, industry, or company levels.
- Participation in co-determination procedures (which could, potentially, be an individual service, as such procedures may concern a single individual)
- Participation on governmental boards and committees, lobbying and involvement in public debates, advertising on general issues to advance trade union arguments in the public domain.

In order to attain more structured information on members' aims related to collective bargaining issues, the organization uses randomized membership surveys and specific web based surveys, open to all members, in connection with national negotiation rounds.

Collective services have not declined in importance during recent years, even though they have changed in character. These changes can be described in terms of rationalization (such as the utilization of new technologies), reduction (of participation in governmental committees), extension (such as international work and lobbying), and decentralization (such as a decentralized responsibility for bargaining in conflict situations – from national to regional levels).

2.8 The growth of individual and targeted services from Sif

It is not new for trade unions to provide services to individual members. On the contrary, this has been a core activity since their inception. Thus, the provision of help and guidance to members in need – groups or individuals – has a long tradition, and has always been given considerable attention and resources. Individual services with a long tradition in Sif include advice on salaries and employment contracts, advice on insurance as well as support and representation when individuals have come into conflict with their employers. These services are still very important. However, new individual services have emerged and the service provision model has been altered in three respects:

- Problem-solving when problems have occurred has been combined with services aimed at being delivered before acute problems occur, such as career planning activities, thus indicating a switch from a reactive to proactive service mode;
- The design of the new services indicates a shift in the trade union role, from reliever – taking care of the member's problems – to enabler – providing the member with the tools for self-action (Normann, 2000);
- New services are seldom dependent on local union representatives as they are mainly provided on the Internet or by Sif staff.

This change in service configuration has emerged over a substantial period and is to some extent a reaction to increasing levels of competition for members. Sif has a long tradition of organizing activities and services for specific professional groups, such as engineers or managers. In the 1990s, these activities and services became more important. At the beginning of the 1990s, special attention was given to human resource staff, employees in the information technology sector, managers, clerks, sales representatives, and technicians/engineers. In 1997, a huge project, SIF Engineer 2001, was launched in order to provide a more attractive membership for engineers (Huzzard, 2000). More recently, projects have targeted specific professional groups (managers) as well as members and potential members in one specific industry sector (IT). The latter has aimed at recruiting new members through a more attractive membership package, developing new individual (often Internet based) services, and enhancing the union presence in established companies and start-ups in the sector.

Specific target groups other than professional groups or groups defined by their belonging to a specific industrial sector are also perceived as important. A special membership category for students in universities and colleges has been actively marketed since 1985, and specific activities and services for student members have been developed by a group of student officers, employed full-time by Sif. Another new target group has been the self-employed for whom a specific membership package, including tailored activities and services, has been offered and marketed since the late 1990s. Together with specific projects aiming at the development of individual members' competencies and skills, the various projects have seen the introduction of new marketing, communication and learning tools. Today, a wide array of individual services is provided through the Sif Internet homepage. For example, since 2000, more than 120 000 members have used the competency and career assessment and development tools displayed on the homepage. Other services include career seminars, specific seminars for managers or students and individual career advice given at face-to-face meetings with professional career advisors.

The increased emphasis on individual members and specific groups of members is also evident in planning and evaluation processes. Listening direct to individual members without 'filtering' information through the representative system has become a more frequent practice than previously. Sif has used membership satisfaction surveys as a performance evaluation tool for several years, and they have been used as continuous evaluation and planning tools since the mid-1990s.

Other activities inducing a stronger focus on listening direct to members include the adaptation of a service quality policy in 1998 and a TQM-based change program from 1999 to 2001. Specific services and activities today are usually assessed by the participants. Members are often used in focus groups when new services and advertising campaigns are developed.

2.9 Sif and market orientation – a conclusion

I have pointed out many examples of Sif's intention to enhance its market orientation, not least how the union generates an abundance of market intelligence. The organization has utilized quantitative market research techniques in evaluations in order to attain information which could not be efficiently acquired and structured through the representative system. It has also used qualitative methods in order to acquire information of a depth and specificity other than that is generally attained through the representative system.

Market orientation of an organization has been described as involving the generation and dissemination of market intelligence, and responsiveness to it (Kohli and Jaworski, 1990: 6). The results of market orientation efforts thus depend on the combined effects of these processes – it is not sufficient to merely generate market intelligence, the information needs to be diffused and utilized. This study will delve further into these issues.

3. Research aims and questions

This chapter takes its starting point in various questions put from the Sif practitioner's perspective. Through a development of some definitions which will be used in this thesis, I present the market orientation methods to be studied, and discuss the trade union characteristics potentially hampering the utilization of these methods. The research questions concern the union capability to utilize market information, opportunities to develop methods and their utilization, problematic factors to overcome in a union setting, and finally, possibilities of drawing general inferences for trade unions from utilizing market orientation methods.

In the previous chapters I have shown that trade unions are increasingly struggling to retain old or attract new members in competition with other unions and service providers. Unions find themselves acting on a member market similarly to firms in a consumer market. A core value of unions has always been the welfare of their members. In the emerging competitive situation, the elected representatives and union staff have to pay increasing attention to understand what the needs of their present and potential members are and providing services that meet these needs. Unions are competing for members in a market for a certain type of services. To be successful in this, unions need to become more member-orientated, so that their service offering becomes better than what is offered by competitors. An increasing number of unions are using market orientation methods originally developed for commercial firms to help them become more responsive to the needs and wishes of their members and potential members.

From the Sif practitioner's perspective a number of questions can be raised, for example whether market orientation methods really help unions become more orientated and responsive to the needs of their members or how market orientation methods borrowed from the consumer field should be adapted to be useful and effective in the union's endeavors to meet the needs of their members. Another question is whether specific structural and managerial factors, embedded in the union context, facilitate the use of market orientation methods, render them more difficult to adopt, or require special adaptation. In this chapter, these issues will be refined and formulated as research questions.

Initially, strategic positioning and service innovation – two core concepts in this thesis – will be defined, and I will describe the two methods to be studied: the Sif Barometer and the Design Dialogue Methodology. The section to follow aims at describing specific trade union characteristics which potentially make market orientation methods difficult to adopt. After discussing these practices, and their specific context, I propose the research questions of the study.

3.1 The meaning of market orientation

Market orientation has been described as the processing of market information, consisting of systematic gathering of information on customers, as well as systematic analysis of such knowledge to guide strategy recognition, understanding, creation, selection, implementation and modification (Hunt and Morgan, 1995: 11). The market orientation concept will be further defined and discussed in Chapter 4, the theory chapter.

To make the concepts derived from the market orientation literature useful in a trade union context, I suggest some adaptations of their customary definition. The term *market orientation* will refer not to a customer market but to a *member market*. A member market consists of persons interested in and able to voluntarily subscribe to membership of a trade union in exchange for access to a set of services and symbolic inclusion in a set of values. *Customer orientation* will be substituted by the term *member orientation* – and this orientation concerns both actual and potential members.

As will be explained further in Chapter 4, I have selected two capabilities that I deem critical for the market orientation of a union. The first of these capabilities is that of *strategic positioning* – to retain and strengthen one's market position. The second of these is the ability to accomplish *service innovation* – renewal and development of the service offering. Strategic positioning concerns a conscious definition and conquering of a position in the external environment of the union. Service innovation concerns the union's internal capability to develop service offerings that are appreciated by the members and that are preferably difficult to imitate.

For a trade union, *strategic positioning* may be interpreted as decisions on prioritizations of specific member segments and aims to maintain or strengthen the organization's (member) market share. A strategy can be seen as a plan for reaching the union's intended position, typically specifying types of services of importance for reaching such a position (Stymne, 1970). It takes considerable time for an organization to establish its strategic position on a market. It requires sustained nurturing of the targeted member segments. These activities have to be based on the union's ability to acquire knowledge and intelligence about customers and competitors. Such knowledge includes information on attitudes, behaviors and the situation of customers and competitors.

In a trade union context, *service innovations* involve both collective and individual services. Innovations can also aim at the service delivery process, i.e. new ways to produce and deliver services to members, for example via the Internet. Market innovations are means to underpin new segmentations of member/potential member groups desired by the union as part of its strategic positioning. Process innovation may also be needed for attracting attention from and communicating with specific groups of members or potential members. Service innovation has to occur more often than strategic repositioning since it may involve experiments to find out how useful new service concepts are. Service innovation is also needed to keep up with the ever changing situation and needs of the members.

3.2 Market orientation methods for strategic positioning and service innovation

As described above, market orientation methods will henceforth in this thesis be treated as means for accomplishing strategic positioning and service innovation. I define market orientation methods as systematic techniques or processes aimed at orienting, positioning, and coordinating a union's activities towards members and competitors. The use of market orientation methods serves to increase the union's capability to obtain an advantageous strategic position and to come up with attractive service innovations. Market orientation methods will be used in this thesis as a term covering a wide array of market orientation activities – from market segmentation to acquisition, analysis, diffusion, and utilization of market information. A market research technique, on the other hand, is a term that will be used only in relation to different methods for market information acquisition.

Examples of market orientation methods useful for strategic positioning are environmental scanning, scenario techniques, techniques for gathering and analyzing market intelligence interviews with current and potential customers/users/members, customer satisfaction surveys and other types of quantitative studies. For the present study, I have chosen to investigate the use of a variant of customer satisfaction studies called the "Sif Barometer". It is the major instrument used for evaluating how well the union is performing in its different member markets and how well different types of services are appreciated by members. The Barometer is of specific importance, as the union does not charge its members for services and therefore needs other indicators than sales figures to evaluate what is offered.

Both quantitative market research techniques and qualitative techniques can be used as an aid for service innovation. In this study I have chosen to concentrate on a variant of the focus group methodology used in Sif, called the Design Dialogue Methodology. One reason for this choice is that qualitative methods such as focus groups are becoming increasingly used when businesses try to develop and test new product and service concepts. An additional reason is that I have had an opportunity to get involved in the development and application of this method in Sif.

3.2.1 A method for strategic positioning – the Sif Barometer

As long as a union has an exclusive de facto or de jure monopoly in a certain segment of members, there would be little need for member satisfaction surveys. Such information has become essential, however, now that unions have to compete for members or to stretch themselves to attract workers with little inclination to become members.

The Sif Barometer is the most comprehensive and widely diffused membership survey that is periodically conducted by the organization. The survey is based upon members' ratings on a ten-digit scale of trade union services and the information is collected through brief telephone interviews with randomly selected members. This is a quantitative methodology, that each year involves about 4 000 members as respondents. The Barometer has been used for strategic positioning – as a means for assessing and providing initiatives for changing the union's strategy, service portfolio and existing services. It provides evaluative and confirmative information on the organization's performance. The relation between the Barometer and the service innovation process is thus that Barometer results point out important areas for improvement. Its role as the only annual overall evaluation instrument in the organization makes it a particularly interesting study object.

A market orientation method such as the Sif Barometer is specifically suitable for use in trade unions. As long as unions do not attempt to price their services individually they need some other way to evaluate the effect of various activities that they undertake in the marketplace. Private companies are guided by sales figures, profit figures, return-on-investment and other measures. These, however, are problematic to apply to unions. Unions cannot be guided or assessed by ordinary sales figures, return on investment figures or other measures in common use among privately owned companies. Membership figures and proportions of unionization are measures at hand for trade unions (Fiorito et al., 1995), but additional information on the attractiveness of the membership package, organizational effectiveness (to provide what is demanded) and to some extent on cost efficiency, may be hard to attain without the utilization of market research techniques. Moreover, as the trade union membership fee covers a portfolio consisting of a wide array of services (unemployment benefit schemes, negotiations on national and industry-wide agreements, individual negotiations, legal advice and representation for members in need, career advice services etc), pricing mechanisms do not help unions assess how members (or potential members) perceive the value of the different items in the service portfolio. To summarize, there are strong arguments for the utilization of market orientation methods for the strategic positioning of trade unions – in some respects the case is stronger than that for many profit-making organizations. However, the overall purpose for utilizing market orientation methods is similar – organizations perceive that they need to know more about their markets, customers or members.

3.2.2 A method for service innovation: The Design Dialogue Methodology

The importance of strong relations between organizations and their customers is frequently stressed in today's marketing literature. Customer relationship management (CRM) is one prominent concept in this literature. CRM concerns the management of the whole relationship between a firm and its customers. Thus, customers should be treated as relational customers – once a relationship has been established, customers should be treated as customers even when they do not make any purchases (Grönroos, 2000: 34). The existing long-term relation between a trade union and its members is traditionally stronger than the relation between a consumer of, for example, coffee and a food company. Nonetheless, CRM's message of creating stronger relationships between organizations and customers may also be beneficial for trade unions. The value of Sif's relationship with the organization's members is evident, as more than 25 000 members have opted to become elected representatives for the organization. These members contribute important information and participate directly in union decision-making. However, their contributions in their roles as elected representatives cannot – due to time limitations and other reasons – substitute for the utilization of market orientation methods. Another factor, indicating the relevance of relations is that the Design Dialogue Groups presented below not only provide information from individuals to the union, but also give the participants the satisfaction of contributing to the development of the organization in which they are members (this point is elaborated in Papers 4-6).

Sif is an organization with an inherently traditional culture of listening to and helping members in need – a majority of the regional activities are based upon demands from members. Moreover, strategic decisions are made by bodies of elected members, representing the members of the organization. However, the organization has no tradition of listening to individual members or involving them when new services or policies are developed. The strong value of providing for the wellbeing of the members is a fertile basis for using market information methods for even more attentive listening to and learning from members.

Listening and responding to elected representatives can be seen as one specific type of market orientation. There is, however, an informally held view in unions that traditional methods (such as utilization of the representative system) do not deliver sufficient information for developing new services that will be appreciated by members. Thus, not least concerning the scanning of needs of potential members, the elected representatives are an arguably ineffective instrument. Additional means of market orientation have therefore been seen to be needed in service innovation processes.

The Design Dialogue Methodology is a market orientation method aimed at developing a culture of listening to members and/or potential members in order to develop and offer activities and services aligned with member needs. This group interview methodology, bearing some resemblance to focus groups, has become an important qualitative tool in Sif. Important reasons for studying the Design Dialogue Methodology are that it is a qualitative technique, signified by a high degree of member/user involvement. The methodology is often used early in design processes and predominantly addresses service innovation. As the methodology has been developed internally in collaboration between this research project and the organization, the opportunities for following and influencing the development of the method have been exceptional. This methodology is a particularly suitable study object partly because of its broad utilization in Sif, partly because of the widespread opportunities to make alterations in the methodology and partly because of the possibility for close proximity to the development processes arising from it.

3.3 Which trade union characteristics make market orientation methods difficult to adopt?

In the previous section, current relations to members and an inherent member service ethos were described as factors potentially enabling the utilization of market orientation methods in trade unions. However, there are two factors that might possibly make market orientation methods more difficult to adopt in trade union settings compared to traditional service markets.

The first factor concerns the governance structures of trade unions. Unions are organizations with unique governance features that have to be administered effectively and appropriately in line with laid down institutional rules. The notion of administrative effectiveness in unions differs little from what we know as universally applicable management practices (Huzzard, 2000: 58). Such practices may include environmental analysis, setting goals and priorities, selection and development of people, organizational change, and generating and introducing innovation (Dunlop, 1990: 19). Issues concerning efficiency of resource utilization and effectiveness of output in relation to preset objectives are thus in focus for administrative effectiveness (Huzzard, 2000: 59). As unified authority and control are important managerial issues, power should ideally be located at the top of the hierarchy (ibid: 59).

On the other hand, for trade unions, organizational legitimacy is related to the fact that unions are subject to representative rationality, an institutional rationality whereby governance involves inherent political processes characterized by democratic procedures (Jonsson, 1995; Huzzard 2000: 58). Unions are membership-driven, and power ultimately resides with the members exercising voice through the procedures of democratic structures. Thus, information must be available for members participating in the decision-making processes (Huzzard, 2000: 59). As representative rationality demands membership involvement, time is required for dissemination of information and to build up resources of support and legitimacy (Chaison et al., 1993). In the representative rationale, power is ideally diffused to the membership (Offe and Wiesenthal, 1980: 80; Huzzard, 2000: 59). Willman et al. (1993) have drawn attention to the tensions between union administrative and representative systems and the fact that control in unions is bi-directional from leaders to members (through formal control systems), and from members to leaders (through democratic structures) (Child et al., 1973; Undy et al., 1996).
Thus, the formal governance structure is complex in trade unions. A high proportion of the input from users/members is provided through member participation in organizational activity and representation in decision-making bodies. These dual rationalities – administrative and representative – can hamper

the utilization of market orientation methods. The potential problem can be described as that of a presumed preference to listen to the elected representatives instead of "listening to the market", i.e. using market orientation methods to listen to and learn from members and potential members. The utilization of market orientation methods (acquisition of information of member needs and opinions) could also potentially be used by members of the administrative system in order to challenge the power positions held by elected representatives.

The second factor concerns the administrative rationality in a trade union. Are there specific features related to this rationality which may cause specific problems related to the utilization of market orientation methods? As discussed above, the complexity of the governance system may interfere with the organization's administrative rationality, even though this has not been a major problem in the setting studied. In essence, within the professional organization (those employed by the union), managerial issues and problems are largely of the same character as in other types of organizations. The main difference in this respect between trade unions and private companies lies in the role played by local trade union branches ("clubs") and elected representatives, in that a large (but in the Sif case decreasing) proportion of the trade union's activities are carried out by these. The Sif Executive and its professional organization have few instruments and rare opportunities to monitor and control trade union activities at shop-floor level. Thus, only a minority of the organization's activities are controlled by management at higher levels. The challenges for market orientation in terms of interfunctional coordination are thus not only related to the professional organization, but also to the lay members.

3.4 Research questions

The focus in this thesis is on the utilization of market orientation methods in trade unions. The underlying assumption that will be questioned and investigated in this research project has been that trade unions could benefit from market orientation methods as argued above. I have perceived and described trade unions as service providing organizations – and have thus found service theories as being applicable to the subject studied. The specific interest behind the research project has been closely related to strategic union renewal and service innovation and development.

The first section of this chapter has briefly introduced the concepts market orientation methods, strategic positioning, and service innovation. These will be used further throughout the thesis. The following section aimed at exploring trade unions as arenas for the utilization of market orientation methods. Following the proposition that trade unions can derive benefits from using and enhancing their existing relations with members through the utilization of market orientation methods, we can now specify the research questions:

- To what extent are unions capable of utilizing the information gleaned from the application of market orientation for strategic positioning and for innovating their service offerings to the members?
- What factors have been especially difficult to overcome in applying market orientation methods in a union setting and what factors have facilitated their use?
- How can market orientation methods and their use be developed to better contribute to strategic positioning and service innovation in trade unions?
- What general inferences can be drawn on the design and application of market orientation methods that are useful in trade unions?

The research approach chosen– in-depth studies in a single organization – has opened up an opportunity to follow the utilization of market orientation methods very closely. From this case study perspective, conclusions with a presumably wider applicability are drawn. This is discussed further in Chapter 5.

4. Theory framework

Market orientation theory and specific aspects of market orientation in relation to trade unions and non-profit organizations are presented and discussed. The concept strategic positioning is then explored, followed by a presentation of the service innovation concept. After a discussion of learning and market orientation, the chapter concludes with a framework for strategic positioning, service innovation and the development of market orientation in trade unions, based upon the theoretical considerations presented.

This chapter starts with a discussion of market orientation, followed by a discussion of market orientation adapted to trade unions (and their strategies) and to other non-profit organizations. *Strategic positioning* and *service innovation* will be treated as two essential capabilities for market orientation by a union. Thus, strategic positioning will be explored, followed by a section in which service innovation is discussed and related to a description of services in a trade union context. In specific sub-sections, design theory and user involvement in service innovation are discussed in relation to service innovation. Differences and links between strategic positioning and service innovation are discussed before a model for strategic positioning and service innovation in trade unions is presented. Thereafter, aspects of learning and market orientation are explored. Finally, a framework for strategic positioning, service innovation and development of market orientation in trade unions is presented. This framework is constructed from the theoretical considerations presented, and has been used as a mental model for the research presented in this thesis.

4.1 Market orientation

Trade unions, such as Sif are member driven organizations. They are actors in a membership market, where they compete in order to attract and retain members. Even if relations with their members are traditionally the province of the union's representative system, market orientation methods commonly used in commercial organizations are nowadays increasingly utilized by unions, too. Market orientation is a concept seldom used in the public debate or literature on trade unions. However, there are exceptions. Heery and Kelly (1994) describe British trade unions as becoming increasingly market oriented. Bassett and Cave (1993) describe the trade union arena as a market and suggest market orientation as a useful means for trade union renewal.

Dahlsten (2004: 18) describes market orientation as being intangible, socially complex in structure, and with components that are highly interconnected. Narver and Slater (1990: 21) propose how this intangible structure can be more precisely defined: "Market orientation is the organizational culture that most effectively and efficiently creates the necessary behaviors for the creation of superior value for buyers and, thus continuous superior performance for the business". They also identify three behavioral components of market orientation:

- Customer orientation, which involves understanding target buyers now and over time,
- Competitor orientation, which involves acquiring information on current at potential competitors, and
- Interfunctional coordination, which is the co-ordinated use of resources in creating superior value for target customers.

Kohli and Jaworski (1990: 6) provide another definition of market orientation as: "The organization-wide generation of market intelligence pertaining to current and future customer needs, dissemination of the intelligence across departments and organization-wide responsiveness to it." These two perspectives on market orientation differ significantly. While Kohli and Jaworski (1990) describe market orientation as a set of processes, Narver and Slater (1990) perceive market orientation as a number of behavioral traits that characterize an organizational culture. Hunt and Morgan (1995: 11) synthesize the perspectives when they define market orientation as "a kind of organizing framework that, if adopted and implemented, could through time become culturally embedded". They further describe market orientation in line with Kohli and Jaworski (1990) as the processing of market information, consisting of systematic gathering of information on customers, systematic analysis of such knowledge to guide strategy recognition, understanding, creation, selection, implementation and modification (Hunt and Morgan, 1995: 11).

The reason for making an organization more market oriented is to increase its ability to attract and retain customers and to create a favorable position vis-à-vis competitors. If such a better competitive situation is obtained, it is supposed to lead to higher goal fulfillment in terms of profitability for a commercial organization. For a non-profit or member-driven organization it leads to higher goal-fulfillment in terms of member welfare and more members. A market oriented union is one that is characterized by a specific culture that helps it to become successful in attracting members. It is member oriented, that is infused with the value (Selznick, 1957: 17) such that "the member is king". Hence, a prime concern of each representative or staff member – and an essential part of his or her "self-image" (Selznick, 1957: 17) – should concern responsiveness to the needs of each individual member. This should also be reflected in its routines. Such a union would be competitor oriented in the sense that it should be aware of the offerings of actual and potential competitors to the benefit of its members in its target area so that it would be able to give these a superior offer. It should exhibit interfunctional coordination such that the members do not receive contradictory signals from different parts of the union. Moreover, the services offered should form a consistent and complete whole. Using the words of Peter Drucker (1954), "There is only one valid business purpose - to create satisfied customers… and it is the customer that decides what the business is."

The authors cited in the preceding paragraphs have provided certain definitions and pointed to processes of how market orientation can be achieved. The strategic aspects are evident in these definitions – and are specifically mentioned by Hunt and Morgan (1995: 11). Accordingly, I will now elaborate on the concept of strategy.

4.1.1 Union Strategy

From a strategic perspective, a business firm is often thought to try to carve out a market position for itself characterized by high demand for its products. To be able to benefit from this market, the firm should have a competitive advantage, that is to offer products and services perceived by the customers as being superior to those of competitors – or to find niches where there are no competitors or where competitors offer inferior products/services. Thus the firm tries to find a strong strategic position. The main means for reaching such a position is by offering products or services that can successfully compete with those of competitors. To defend the firm's strategic position or improve it, its management has to engage in strategic positioning, that is to define which market the firm should aim to be in and which products and services it should offer to hold its own against competitors. An important tool for strategic positioning is corporate strategy: "A strategy is the pattern or plan that integrates an organization's major goals, policies and action sequences into a cohesive whole. A well-formulated strategy helps to marshal and allocate an organization's resources into a unique and viable posture based on its relative internal competencies and shortcomings, anticipated changes in the environment and contingent moves by intelligent opponents" (Quinn 1980). Mintzberg (1987) discusses strategy as five Ps: plan, ploy, pattern, position, and perspective. The description of strategy as position defines strategy as a means of locating an organization in an environment. Given this definition, strategy becomes a mediating force – a "match" between organization and environment (Hofer and Schendel, 1978: 4).

Translated to the trade union setting, the union attempts to obtain a strategic position that permits it to satisfy the needs of its members in a way superior to its competitors. The main way to obtain a strong position characterized by many and satisfied members would be to offer services that provide them with value. When the competitive pressure mounts and changes in the task environment of the union increase, the union will have to innovate the services it offers its members. Therefore the strategy of the union leadership will ultimately have to result in new services. This reasoning has led me to select two major foci for market orientation in unions:

- *Strategic positioning*, meaning strategic planning and other activities undertaken by the leaders and managers of the union in order to maintain or improve its strategic position vis-à-vis its members and competitors, and
- *Service innovation*, meaning the process of innovating the services offered by the union in order to bring about a favorable strategic position.

4.1.2 Market orientation in trade unions and non-profit organizations

A general trend in the trade union research of the 1990s was to emphasize a strategy perspective. Organization theory and strategic management theory have been used to study unions as interfacing with environments (e.g. Boxall and Haynes, 1997; Dunlop, 1990). Huzzard (2000) has discussed how union leaders in particular as critical actors exercising strategic choice to ensure organizational and environmental alignment as a key condition for reaching union goals. Other researchers have described union relationships with union members and employers in terms of "markets" (Bassett and Cave, 1993), or an orientation towards individual needs among members (Heery and Kelly, 1994; Turnbull, 2003). These studies discuss the consequences of the use of market orientation methods in unions, even if they do not specifically define the market orientation construct.

While Bassett and Cave (1993) and others argue that trade unions must become more inclined towards the provision of individual services, there are also authors such as Heery and Kelly (1994) who are rather negative towards what they call "managerial servicing" or "managerial unionism". They criticize the approach whereby unions view their members as "reactive consumers" whose needs must be discovered through ballots, polls and market research (Heery, 1996, 1998, 355; Thatcher, 1996; Undy et al., 1996). Following Heery and Kelly (1994), Turnbull (2003) argues that a "managerial unionism" does assume a passive membership. Williams (1997) is more positive towards union provision of individual services, but argues that individual services, to be valuable, must be founded upon collective organization.

In chapter 2, I referred to the view of normative political science (Lewin, 1970) that different forms of member participation reinforce rather than counteract the functioning of a democracy. Since the critics of market orientation of unions have not presented empirical evidence to substantiate their claim, I hold that the utilization of market orientation methods can indeed contribute to an incorporation and advancement of individual values – and strengthened member participation – in trade unions. In this respect I concur with the view of Williams. Support for this view can also be found in Madsen (1996), who studied trade union participation and individualization in Denmark and Sweden. He concludes that it is necessary to improve union organization and representation of interest – and that the challenge consists of incorporating and advancing the new values of members in actual union policy.

Research on marketing and market orientation in non-profit organizations at large is more developed than that for unions and is also addressed by specific scholarly journals. Even if it can be argued that unions are more preoccupied with bettering the lot of their members compared to the more societal orientation of the typical non-profit organization (Liao et al., 2001), the two types of organizations share many characteristics (c.f. the non-profit organization criteria presented by Vázques et al., 2002: 1023; Lovelock and Weinberg, 1984). The massive evidence published for the utility of market orientation methods in non-profit organizations is therefore a strong indicator that they also could be useful for unions (Drucker, 1990; Hannagan, 1992; McLeish, 1995; Kotler and Andreasen, 1996; Sargeant, 1999; Álvarez et al.; 2002, Vázques et al., 2002).

4.2 Strategic positioning

Strategic positioning of a union refers to strategic planning and other activities that union leaderships undertake in order increase their union's value in the eyes of the members and to strengthen its power in relation to its competitors. Among other things, the process of strategic positioning based on market orientation involves the following activities:

- Gathering of information and intelligence about members and competitors;
- Information processing
- Making decisions of a strategic nature, for example about how to meet the changing needs of members with services offered by the union;
- Ensuring that the management's strategic intentions are followed by the union staff and that the type of services that could improve the strategic position are implemented;
- Exercising leadership in the organization and infusing it with the value (Selznick, 1957) of the importance of the individual member so that all lay representatives and staff members act in accordance with the strategic intentions without always being explicitly being told to do so. Such leadership may contribute to an incorporation and advancement of individual values and thus enhance participation and democracy (see above and Chapter 2). This activity adds up to creating the member-oriented culture suggested by Narver and Slater (1990).
- Evaluating the strategy and improving the whole process used for strategic positioning including the way members are listened to and how such information is acted upon. This, in effect, is a process of double-loop learning (Argyris and Schön, 1978).

A new strategy may be formulated quickly but to get the organization to adhere to it takes many years. The strategic positioning process has therefore a predominantly long- or medium term perspective and utilizes knowledge about members, competitors and other environmental aspects of importance. Knowledge on the attitudes and behaviors of members and competitors is investigated. Opinions collected from a randomly selected group of members are often used to represent the whole collective or specific membership segments. Using the terminology of Hatchuel et al. (2001), market orientation aimed at contributing to strategic positioning involves improvement in the organization's knowledge of markets and members. Strategic positioning in a trade union is a process aimed at keeping and strengthening its market position – maintaining and developing its distinctive competence (Selznick 1957; Stymne 1970). The purpose of strategic positioning is to assess and determine how to handle uncertainty, to create a specific set of goals, and to manage the process of convergence towards these.

For a trade union, the strategic positioning process thus aims at contributing to actions in order to develop a strategic position. This could be defined as the value of the organization's service portfolio as perceived by members and potential members in the organization's prioritized membership segments. The fit between the service portfolio offered and the members targeted should then be considered as a core strategic issue.

4.2.1 The Sif Barometer – the studied method for strategic positioning

I have chosen to use an instrument called the "Sif Barometer" to represent a method a union uses in its strategic positioning process. The Barometer has been described in Chapter 3 as the most comprehensive and widely diffused membership survey that is periodically conducted by the organization. The survey is based upon members' ratings of trade union services and the information is collected through brief telephone interviews with randomly selected members. Each year about 4 000 members are involved as respondents.

In studying the Barometer I focus on the union's ability to utilize acquired data in strategic positioning processes. I concentrate on the process of creation and presentation of strategic alternatives for decision-making, but to some extent also deal with the union's ability to implement strategic decisions.

The Barometer methodology has been utilized in the organization studied several years prior to this study commencing. Hence, the methodology studied is an existing quantitative methodology with the explicit purpose of contributing to evaluation and decision-making at the strategic level as well as to the prioritization and formulation of goals at the operational level. The Barometer is intended to contribute to the activities for strategic positioning described above (4.2).

4.3 Service innovation

Service innovation is described above as the main way to implement Sif's strategy and to establish or change its strategic position. This section aims at describing service innovation as an adaptation to the context of unions of the business innovation concept.

Business innovation contributes to the renewal of products, services and processes as well as how these services are marketed. Market orientation having this purpose is often of a more short term character than strategic positioning and it aims at collecting new concepts and knowledge from customers and competitors. Customers participate as individuals, representing themselves – their individual needs and ideas are investigated. The aim is to find and nurture creative ideas. What characterizes innovative processes is that there is no clear task to realize (Hatchuel et al., 2001: 6). Thus, the target of an innovation process is not a well-specified goal but what has been named a field of innovation: an area for innovative design (ibid: 11). The innovation process is characterized by uncertainty and may result in divergence: different approaches may produce completely different solutions, more or less applicable in real-life settings.

Theoretically and practically, market orientation with the intent to contribute to business innovation adheres to the literature on market orientation and creativity. It is suggested that creativity is a mediator between market orientation and new product success (Im and Workman, 2004: 114; Day and Wensley, 1988; Han et al., 1998; Song and Parry, 1997). Creativity is in general viewed as a construct that precedes innovation, by Amabile et al. (1996: 1154) expressed as follows: "All innovation begins with creative ideas... [C]reativity by individuals and teams is a starting point for innovation; the first is a necessary but not sufficient condition for the second."

The nurturing and development of creative ideas are considered the core elements in an innovation strategy (Zaltman et al., 1973) for at least three reasons (Im and Workman, 2004: 115). First, the generation of new ideas – one of the key determinants of innovation – is motivated by creativity (Amabile, 1988; Amabile et al, 1996). Second, product differentiation is a result of creativity (Andrews and Smith, 1996; Song and Montoya-Weiss, 2001; Song and Parry, 1997, 1999). Third, creativity can provide a competitive advantage as it is a strategic resource that is valuable, flexible, rare, and imperfectly imitable or substitutable.

Im and Workman (2004) have studied novelty and meaningfulness as key determinants of innovation and their conclusion is the following: "When a firm works to listen and respond to the customer's voice and to interact closely in order to share information across functional groups, it tends to provide meaningful products and programs (though not novel ones)" (Im and Workman, 2004: 127). Their study also indicates that meaningfulness is more important than novelty for new product success. Both novelty and meaningfulness should be targeted in innovation processes, as ideas need to be both original and meaningful to be considered being innovative. Moreover, members contribute novel ideas, when given appropriate conditions (Magnusson, 2003). This is specifically treated in Paper 5, in which group creativity – and theories related thereto – are discussed.

The concept *business innovation* will henceforward be substituted by *service innovation*, as the latter concept adheres more closely to the service innovation processes in the trade union context studied here.

4.3.1 What services are provided by a union?

The account in the introductory chapters has depicted a union as aiming at the development and provision of services to its members. This indicates the need for a brief discussion on specific service properties. Theoretical and empirical service research has mainly taken place in privately owned commercial businesses (Rees, 1998). As will be discussed below, trade unions have scarcely been in focus in service research.

Services in non-profit organizations have been divided into collective goods, trust goods, member services, and production of voice or interest (Wijkström and Lundström, 2002). *Collective goods* are defined as infinite, as an individual's consumption of these does not interfere with other individuals' consumption of them. National defense and environmental work are two examples. Such goods are predominantly financed by the government. *Trust goods* are defined as goods whereby an information asymmetry exists between the buyer and the seller. In order to not let the seller take inappropriate advantage of a stronger position, trust goods are often provided by the society or by non-profit organizations. Examples of trust goods are institutions for elderly people and day nurseries. *Member services* are only available for members, and, finally, *production of voice or interest* concerns the role taken by the organizations as representing their members in different arenas.

Trade union services are partially trust goods (such as the administration of the unemployment benefit system), partially member services, and partially production of voice or interest. It is useful to describe trade union services from the perspective of the service users:

- Individual services, targeting the individual member. These services follow the service definitions presented above.
- Collective services, different from individual services as they target all members or groups of members. Hence, the service provision process is different; as it does not necessarily (indeed rarely) involve the individual. It can be useful to mention a few examples of collective services:
  - Negotiations and collective agreements at European, national, industry, or company levels.
  - Participation in co-determination procedures.
  - Participation on governmental boards and committees, lobbying and involvement in public debates, advertising on general issues to advance trade union arguments in the public domain.

The analytical distinction between individual and collective services is hard to draw in practice. When participating in co-determination procedures, unions represent all members involved – in some cases this means that the union negotiates for each single member. Alternatively, a collective insurance covering income losses in case of unemployment is a collective service, contributing to enhanced financial security for individuals and their families. When the insurance is used, it transforms into an individual service, providing financial means to the individual. Given these considerations, despite some expressed fuzziness about the definitions, the notions individual and collective services are nonetheless useful in the union context studied here.

How do collective and individual services relate to the descriptions given of services in non-profit organizations? The table below provides examples of trade union services defined from both these perspectives.

Table 2. Service aims and target groups: trade union examples.

	Trust goods	**Member services**	**Production of voice or interest**
Collective services	Security through affiliation to insurance schemes	National agreements, Local agreements	Lobbying on regional, national and international level, proposals for new labor legislation
Individual services	Utilization of unemployment benefit schemes	Individual salary agreements, Career coaching	Participation in trade union education, activities, decision-making, Internet based member communities

Trade union services may be studied and defined from other perspectives than those given by the table above. In this thesis, services are discussed in terms of relieving and enabling as one dimension of user involvement during service delivery. Trade union services may also be described as degrees of standardization/personalization. Other important perspectives include physical proximity between the service deliverer and the user (from "face-to-face" to the Internet).

Collective services may in a way be even less tangible than individual services. As an example, lobbying activities are other collective services that are intangible and often distant from the individual member. Nevertheless, these kinds of activities can be described as services. However, the service delivery process is different from what is common in relation to individual services, as individuals in the case of collective services have a more distant role and seldom participate in the service delivery process. The individual benefits from collective services may also be more difficult to trace and evaluate, as they may be distant both in terms of geography and time. Individual and collective services are discussed further in Paper 1.

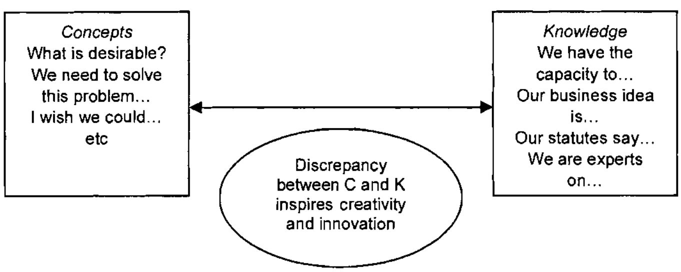
4.3.2 Design theory – confronting new ideas with the knowledge system of the organization

Design theory aims at describing mechanisms behind innovation processes. Armand Hatchuel has discussed design theory in a number of articles. The basic assumption behind his description of design theory is that "Human agents have a surprising and infinitely expandable ability to create stories, forms, and concepts." (Hatchuel, 2001: 270). According to Hatchuel (ibid), design abilities not only consist of adequate problem solving procedures, but also of at least three crucial processes:

- improving concept expandability: learning to manipulate concepts,
- designing new learning devices: new prototyping, virtual mock-ups,
- looking for new forms of social interaction in design, such as involving users or other stakeholders in the design process.

During innovation phases, a specific creativity challenge lies in the development of new concepts. "There is nothing that is already known that initiates a project, we need a new concept: a set of words for which we recognize that some knowledge is missing to make it already possible" (Hatchuel and Weil, 1999: 12). All organizations organize their internal knowledge system according to some kind of functional division, suitable for its overall mission. Innovative ideas pose by definition challenges to the knowledge system and initiate a debate on whether the idea is feasible to accomplish. Hatchuel defines an innovation process as the dynamic relationship between concepts and knowledge (Figure 2). Knowledge is based on propositions having a logical status whereas a concept is a notion, without logical status (Hatchuel and Weil, 2002: 12). A concept may or may not include pieces of knowledge, but its meaning is not logical (such as a flying boat). An organization relies mostly on knowledge, even if the theory is local ("in our organization we have defined causality like this").

Figure 2. Concepts and knowledge



Thus innovative design is the art of linking concepts, knowledge, value and competencies. The target of an innovation process is not a well-specified goal but what has been called "a field of innovation" — an area for innovative design. The design and development of new services originating from the knowledge ability of an organization tends to create results that resemble already existing versions. These become upgraded versions: they use existing technologies or operations, or they transfer solutions from one service area to another. In short, they tend to lack the creative elements that make them radical. The knowledge base needs to be confronted with and provoked by an alternative approach articulated by individuals with a different concept of reality.

Hatchuel and Weil (1999) discuss the theoretical implications of the discrepancies between concepts (C) and knowledge (K). They show the importance of a dialogue between spokespersons for these two realms. They provide examples of groups and teams which fulfill the role of translating between the C and the K worlds as well as activities which bridge the gap between them. However, the authors have not specifically described the nature of the mediating activities.

4.3.3 Member involvement in service innovation

User participation in product or service development has become an important practical issue and research topic. It is commonly considered that end users or customers are able to contribute to the development of new products or new services in different ways. Since they have other experiences than professional staff, who participate in the innovation process more or less on a daily basis, they bring with them other experiences and other priorities which enable them to see different service and quality dimensions of new products or services (Magnusson, 2003; Iansiti and MacCormack, 1997; von Hippel, 1977; Hatchuel, 2001).

Innovation of tangible products has been the subject of more research than service innovation (de Brentani, 1995). However, the specific service characteristics described above indicate that the development process of a new service may be different from the development of tangible products (de Brentani, 1995; Storey and Easingwood, 1996). The importance of involving customers in product innovation is emphasized by many (von Hippel, 1988; Gupta and Wilemon, 1990; Kaulio, 1997). According to Alam (2002) and Johne and Storey (1998), remarkably few studies on customer involvement in service innovation have been conducted, in spite of an emerging perception among service providers of the importance of interaction with potential users during development processes (Alam, 2002). However, a few researchers have shown that user involvement in the development of new services is an important success factor (de Brentani, 1995; de Brentani and Cooper, 1992, Edgett, 1994).

The organization studied, Sif, has no strong tradition of listening to individual members or involving them when new services or policies are developed. However, in recent years, involvement of members and potential members in developmental processes has been relatively frequent. The Design Dialogue Methodology studied is one expression of this interest. This involvement of users adheres to what was described above as looking for new forms of social interaction in design.

4.3.4 Design Dialogue Groups – The studied technique for service innovation

I have emphasized service innovation as a means for changing the strategic position of a union. As an expression of this process, in my role as researcher, I focus on the union's ability to bring to development new and innovative

suggestions for services. I will only in passing deal with the union's ability to implement the service ideas that have been created, and thus concentrate on the process of creation of service ideas.
In order to study how information from members could be used for creating new service ideas, I developed a member orientation technique called the Design Dialogue Methodology based on the design theory and ideas about member involvement explicated above. Design principles have been derived from design theory and have guided my descriptions of concrete, mediating activities.

The Design Dialogue Methodology involves bringing together individuals and asking them to describe services that they would want to obtain from the organization. This process has opened up possibilities that such ideas will be different from those generated by the internal knowledge system.

When "ordinary users" participate in a design process, it has been shown that innovative dynamics are curbed, if design experts ("knowledge carriers") participate in the design process (Magnusson, 2003: 81). Thus, in the creative stages of the idea-generation process, it is more likely that unique and provocative ideas will be formulated, if "experts" from the organization do not participate. The methodology has therefore been designed in order to create an arena for "ordinary users", where the expert role is to initiate and facilitate discussions, but not to participate with his or her knowledge on the subject discussed.

A process of concept generation challenges the knowledge system of the organization. The idea behind the Sif Design Dialogue Methodology is to encourage new concepts from union members – and a creative group process is thus an important means for accomplishing this. A concept should not necessarily be understood as a developed and clear idea, as it could also emerge as a clearer description of attitudes or needs. New concepts may be more or less well developed. A feature they have in common is that in some way they indicate new links between values and competencies. A problem is that less developed concepts tend to be lost, as they may not be identified, elaborated, or evaluated.

The thesis will contribute specific design propositions related to activities mediating between the C and K worlds (See Figure 2). These will address the acquisition and development of concepts and knowledge.

4.4 Designing and Improving the Union Model for Market Orientation

In this section, an initial model for trade union utilization of the market orientation methods will be presented. The two core concepts in the model, strategic positioning and service innovation, have been described above as two critical capabilities for the market orientation of a union. In the model, inputs from members and competitors and outputs (the service portfolio) are linked to strategic positioning and service innovation. However, before the model is presented, a discussion on differences and links between the strategic positioning processes and the service innovation processes will provide additional suggestions for the model.

4.4.1 Strategic positioning and service innovation in a market orientation context – differences and links

The Barometer and the Design Dialogue Groups have been chosen because they represent two different yet central processes of market orientation: *strategic positioning* and *service innovation*. Their different logics are not least evident in respect of interfunctional coordination. Strategic positioning aims at using the market as a resource for formulating and assessing objectives for the organization – and thus interfunctional coordination is a matter of aligning the strategic goals of the organization with its capability to reach these goals. Interfunctional coordination related to service innovation aims at handling the uncertainty of the innovation process. Divergence must be accepted and organized, the horizon must be contingent, as many new concepts will not be immediately used, and the re-use of excess knowledge must be managed (Hatchuel et al., 2001).

As both strategic positioning and service innovation have been important terms in this chapter – and will be so in the following chapters of this thesis – the specific properties that have been described as being connected to these terms can be usefully summarized in a table. Table 3 exhibits these properties. I have chosen to use aim, time perspective, contributions from listening to members and use of information from the members as a first set of variables, as these contribute to overall descriptions of the two objectives for market orientation presented here. The following content variables originate from Narver and Slater (1990), while the process variables have been described by Kohli and Jaworski (1990).

Table 3. Specific properties of strategic positioning and service innovation as specific objectives of market orientation.

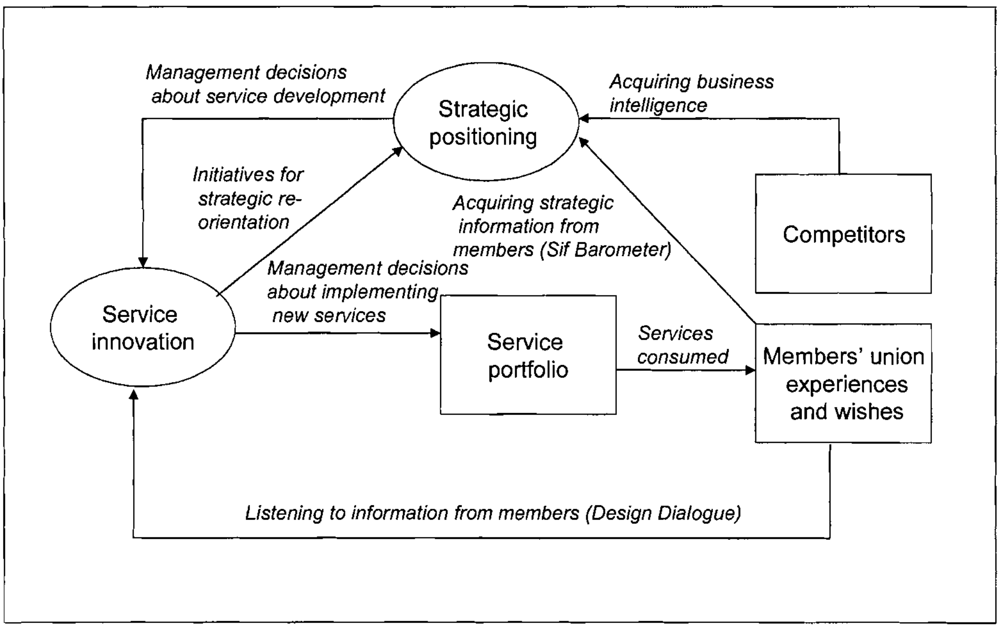
Properties	**Strategic Positioning**	**Service Innovation**
Aim	Assessing and handling uncertainty by the leadership's designation of a specific set of goals and futures	The organization's handling of the uncertainty inherent in the design of future services, markets, processes
Time perspective	Long- and medium-term	Often short-term
Contributions from listening to members	Knowledge about organizational performance through member attitudes; Opinions from randomly selected members to represent the whole collective or specific target groups	New service concepts and knowledge on service design; Knowledge of member needs; Opportunities for members to participate and be appreciated for their individual ideas; Creativity; Diverging ideas
Use of information from the members	Assessing directions; Confirmation or disconfirmation of actions taken	Development of fields of innovation
Content		
Member orientation	Answers to questions about opportunities and threats	Concepts and ideas created by the members
Competitor orientation	Reflected in revealed relative satisfaction measures	First hand knowledge through the members' experience of available alternatives
Interfunctional coordination	Dissemination of market intelligence on an aggregate, strategic level	Representatives of different functions engaging in dialogue with individual members
Processes		
Member intelligence generation	Quantitative methods, centralized function	Information is generated and acquired by the users of the information, i. e. innovation project members.
Intelligence dissemination	Distribution of market information useful for strategy development and control	Dissemination through bottom-up processes.
Responsiveness to member intelligence	Necessity to formulate and assess objectives on a union-wide level.	Ability to nurture creative and divergent ideas

4.4.2 A model of a member-responsive union

The literature describes problems concerning the simultaneous management of renewal efforts and of short-term efficiency. Hence, it has been suggested that exploration and exploitation processes should be organized separately (Thompson, 1967; Normann, 1977; Spender and Kessler, 1995; Tushman and O'Reilly III, 1996; Katz and Allen, 1997). However, from the perspective of utilization of market information, this does not seem to be an entirely good idea, as there are elements of exploration and exploitation in strategic positioning as well as in service innovation. A very concrete example could be that information acquired through Design Dialogue Groups may often be useful for exploration as well as for exploitation. The recommendation of a complete separation of exploration from exploitation should thus, from a market orientation perspective, be rejected.

On the basis of the theoretical considerations presented above, the model depicted in Figure 3 for strategic positioning and service innovation in a trade union has been developed. The purpose of the model has been to synthesize the theories utilized and to form a conceptual background for the research conducted.

Figure 3. A model for strategic positioning and service innovation in trade unions.



The model indicates that strategic positioning and service innovation processes have their background in the organization's relative strength vis-à-vis competitors and its members' experienced satisfaction with the services provided. This strength vis-à-vis competitors and member satisfaction could be described as the organization's strategic position. Information on competitors and members are organization's strategic position. Information on competitors and members are the key two sources for deciding on strategic positioning. This positioning is a process, whereby strategic alternatives are developed in order to be fed into organizational decision-making.

Service innovation processes predominantly aim to develop the service portfolio through service innovations and service development. The information utilized in this process is acquired from members (and competitors) and through the positioning process.

The service portfolio offered is the organizational means to reach the desired strategic position. Thus, the service portfolio not only consists of a set of specific collective and individual services, but also of marketing and service delivery processes aligned with organizational objectives to reach specific groups of members, potential members or other important stakeholders.

In the organization studied, the Barometer is an important example of a market orientation method predominantly used for strategic positioning and the Design Dialogue Methodology is an important example of a market orientation method predominantly used for the design of new services/service innovations. It is, however, important to realize that many other information sources to aid positioning and design exist in the organization – not least the representative system.

The two processes illustrated in Figure 3 are decoupled in the sense that the strategic positioning process receives its information from members as aggregated statistical data and the service innovation process receives input through listening to individual members. However, the processes are also linked in two ways by management strategy and decisions. Management can, from its strategic considerations, require that certain services are developed. Management can also decide or influence which of the services that have actually been developed should be included in the union's service portfolio and thus offered to the members. Therefore the union's leadership and management constitute the main link between the two processes. If this link becomes non-existent the innovative activity will proceed without any reference to strategic assessments of market opportunities. This is a not an uncommon situation in industry where R&D organizations can proceed for a long time to develop products that no longer meet the requirements of customers – often with catastrophic consequences. If the link, on the other hand, becomes too tight, management will virtually dictate what products should be developed independently of the state of technical and scientific knowledge. This situation is also not uncommon in industry. To give one example, many firms producing audio equipment went to the wall because their managements did not see opportunities offered by the transistor.

4.4.3 Learning to become market oriented

Baker and Sinkula (2002) discuss three types of market learning. The least developed type – Phase I learning – implies limited change, is manager-driven and is affected only by confirmative market research. Phase II learning bears a close resemblance to single-loop learning (Argyris and Schön, 1978) or adaptive learning (Senge, 1990a), as it affects joint organizational action but does not lead to reflection and altered mental models of the organization. The highest order of market learning – Phase III learning – affects mental models, such as organization-wide beliefs about the world. This double-loop learning (Argyris & Schön, 1978) or generative learning (Senge, 1990a) may affect the learning culture in an organization in terms of meta- or deutero learning (Sinkula, 1994) – learning how to learn.

Cyclical models provide another way of describing learning. Both single-loop learning and double-loop learning can take place through cyclical processes. The model presented in Figure 3 encompasses two learning cycles (see Kolb, 1984). One involves taking action by introducing new services via strategic intelligence (for example the Barometer) and, in turn, prompting the decision to introduce a new service whereafter a new learning cycle commences. The second cycle starts with innovating services which are evaluated by individual members and then put to management for consideration. These two learning processes should be able to result in a superior position for the union through its inherent customer orientation. However, these learning processes (single-loop learning) may not be robust enough because their couplings and other features may be flawed. For example, management may have a tendency towards either laissez faire or towards being autocratic. As a consequence, the organization may find problems in its positioning and design processes, eventually resulting in a weakened strategic position. Accordingly, an organization needs to learn permanently about its own practices and to further develop the utilization of knowledge attained from its members and environment (double-loop learning).

Models shaped as learning cycles are described by many authors and researchers, including Imai (1991), Dewey, Deming and Handy (Ross et al., 1994) and Coghlan and Brannick (2001). Kolb (1984) describes a process of experiential learning for individuals, teams or organizations that includes the following stages:

- *Experiencing*, whereby the task assigned is carried out;
- *Reflection*, whereby what has been done and experienced is reviewed through the actor(s) stepping back from task involvement;
- *Conceptualization*, whereby events are interpreted and understandings reached on the relationships between them;
- *Planning* (testing in new situations) whereby the new understandings are utilized and translated into predictions about what is likely to happen or what actions should be taken to refine the accomplishment of the task.

Cyclical models have been criticized on different grounds (Dewey, 1933; Jarvis, 1987; Tennant, 1997). A rigid interpretation of such models causes problems. However, they are useful, if the following is considered:

- The circularity is a simplification, as we never return to the same situation again (Gustavsen et al., 1991). Accordingly, the models have been better represented as spirals.
- The sequence of processes represented in the models may neither describe how the processes actually proceed (Dewey, 1933), nor what the most efficient sequence is. The importance of the stages lies primarily in their descriptions of obligatory passage points or moments in a learning process.

4.4.4 Learning and change in a market orientation context

Scholars have asserted that market orientation is a necessary, but not always a sufficient condition in facilitating the innovations required for long-term competitive advantage (Baker and Sinkula, 1999, 2002; Dickson, 1996; Han et al., 1998; Slater and Narver, 1995). This research stream has suggested that abilities to engage in higher order learning must accompany a strong market orientation before a firm is likely to achieve long-term competitive advantage. Thus, Slater and Narver (1995) as well as Baker and Sinkula (2002) argue that there is a synergistic effect on organizational performance between a market orientation and a learning orientation – market orientation enhances performance only when it is combined with a strong learning orientation (Baker and Sinkula, 2002: 8). Baker and Sinkula thus define market orientation as the degree to which a firm's analysis of its external marketing environment (an outcome of market information acquisition, dissemination, and interpretation activities in regard to customers, competitors, channel members and strategic partners) influences the strategic planning process. Furthermore, they have defined a learning orientation as the degree to which firms proactively question whether their existing beliefs and practices actually maximize organizational performance (Argyris and Schön, 1978).

The literature on learning in organizations is based on many different disciplines and thus provides numerous perspectives (Shani & Bushe, 1987). Nevis et al. (1995) find three different perspectives on organizational learning. The normative perspective suggests that organizational learning only takes place under a unique set of conditions (Senge, 1990; Watkins and Marsick, 1993). From the developmental perspective, the learning organization represents a late stage of the organization's development (Argyris and Schön, 1978; Kimberly, 1979). Finally, the capability perspective presumes that learning is innate to all organizations and that there is no one best way for all organizations to learn (Nevis et al., 1995; Wenger, 1996; Yeung et al., 1999).

Argyris and Schön (1978) argue that learning does not really occur in an organization unless change takes place. In the context studied, learning is intended to be organized through the involvement of members/service users and through work routines aimed at elaboration and utilization of ideas acquired from members or through internal processes. Hence, theories and strategies of learning through change have been important in the framing of the studies conducted.

Learning through the change of work behaviors is the core element of a task alignment strategy. Beer et al. (1990) are interested in human resources as critical factors behind organizational renewal. Their experience is that programmatic changes based on standardized solutions, often targeting one specific issue such as culture or organizational structure, are seldom successful. They propose task alignment as an alternative strategy, based on the assumption that the core human resource attributes coordination, commitment, and competence are best developed through changed behaviors in terms of work routines. Successful revitalization calls for a management focus on the business's central competitive challenges as the means for motivating change and developing new behaviors and skills. Work roles, responsibilities and relationships within a unit are redefined through task alignment, without changing the organizational chart. By changing how people work together around core tasks, a commonly understood and legitimate ad hoc team organization emerges. One of the main advantages of task alignment as a change strategy is that it is not only an approach for solving problems in the long term, but also an immediate response to tangible business problems. Task alignment is a strategy targeting learning capabilities in the organization. Beer et al. (1990: 12) suggest three human sources – besides technology skills – of competitive advantage:

- *Coordination* concerning how well employees work together when accomplishing their value-creating tasks.
- *Commitment*, consisting of high levels of motivation.
- *Competence*, consisting of business knowledge, analytical knowledge, and interpersonal skills.

These three human resource attributes are closely interrelated. The driving force is the commitment developed in the earlier stages, which energizes employees to address fundamental problems of coordination. As these are addressed, necessary competencies are learned on the job as well as through supportive training and coaching (Beer et al., 1990: 103). Self-discovery gives each department and its individuals freedom of choice within well-understood guidelines (Beer et al., 1990: 107). These human resource elements are in turn determined by the organizational design in terms of structure, people, roles, responsibilities, relationships, and systems.

A strategy inducing task alignment is opportunistic, as it assumes that renewal can spread more quickly if it is allowed to emerge in those functions and departments that are most ready – and where involvement is likely to result in increased power (Beer et al., 1990: 93). Further suggestions for successful revitalization are building on other changes occurring (such as technology, leadership, physical arrangements, product mix, or market strategy) (ibid: 134) and starting with easy units first (new, small, and organizationally isolated) (ibid: 135).

Beer and Eisenstat (2000) specifically address the problems of strategy implementation and learning. They discuss positive experiences from a method in which task forces play a substantial role. In brief, the method starts with the top team of the business unit or corporation defining its strategy. A cross-functional team (task force) of lower-level managers is commissioned to collect data concerning strengths and barriers to implementing the strategy. The task force then conducts interviews with organizational members and customers and finally reports to the managers and researchers involved.

In my research (Paper 6), the task alignment and task force concepts have been useful for the development of design principles related to organizational learning and change through listening to members. My research thus contributes with concrete descriptions of task alignment strategies and utilization of task forces.

4.4.5 Learning to utilize member information

The use of market knowledge within firms is discussed in an article by Menon and Varadarajan (1992). They provide a review of different approaches to the measurement of market knowledge utilization, but conclude the article with a call for a clear identification and definition of market knowledge utilization. Menon and Varadarajan (1992: 62), develop a new knowledge utilization typology, conceptualized along three dimensions:

- *Action-oriented use*: demonstrated in changes in the user's activities, practices or policies that can be linked to the findings in the study.
- *Knowledge-enhancing use*: resulting in changes in the user's knowledge and understanding of the issues and themes of the study.
- *Affective use*: relating to general levels of satisfaction, confidence, and trust. This could be expressed as the use of research with the intent (italics in original) of "feeling good".

Menon and Varadarajan (1992) discuss a variety of factors influencing market knowledge utilization. A factor of specific interest is perceived credibility and usefulness of the information. Underlying credibility dimensions are realism of research, accuracy, level of specificity of the problem addressed, consistency of the research output and implications, comprehensiveness and completeness of the research, and validity of research from both theoretical and methodological standpoints. Underlying usefulness dimensions are meaningfulness (of personal interest and making sense to users), goal relevance (relating to the tasks facing the users), operational validity (action-oriented and such that something can be done with it), and innovativeness (degree of non-obviousness).

Deshpande and Zaltman have discussed market research use in a series of articles (Deshpande and Zaltman, 1982; 1984; 1987). They have identified variables affecting the managerial use of market information. Arising from their research (Deshpande and Zaltman, 1982), organizational structure, technical quality, surprise, actionability, and researcher-manager interaction were found to be the most important variables.

Piercy (1995) argues that customer satisfaction has been in focus over the past few decades as a means to reach high market performance, but that virtually no serious attention has been given to the use of customer satisfaction studies to improve performance. In his study, Piercy (1995) finds internal barriers that can hamper the proper use of customer satisfaction survey results. Survey findings included many internal barriers in companies. Among these are internal politics (that customer satisfaction measures become part of the "politicking" between departments and groups), market simplification (that people make assumptions about the market and customers that make customer satisfaction issues appear unimportant), and corporate culture (that evaluating and using customer satisfaction measurements is believed to be "inappropriate"). Other hindering factors are market complacency (that people believe they know what customers think and that they have the best product, which is what really matters), resources/capability (problems in getting resources and expertise), and cost barriers (that finance is not available). Finally, credibility (that the results are seen to be ignored) is identified as a key factor.

Knowledge about the actual utilization of market information is a prerequisite for enhanced utilization. The research presented in this thesis has revealed knowledge about the utilization of market information in the studied organization. Moreover, this learning process has resulted in specific propositions on enhanced utilization of market information. This relates closely to the following two research questions:

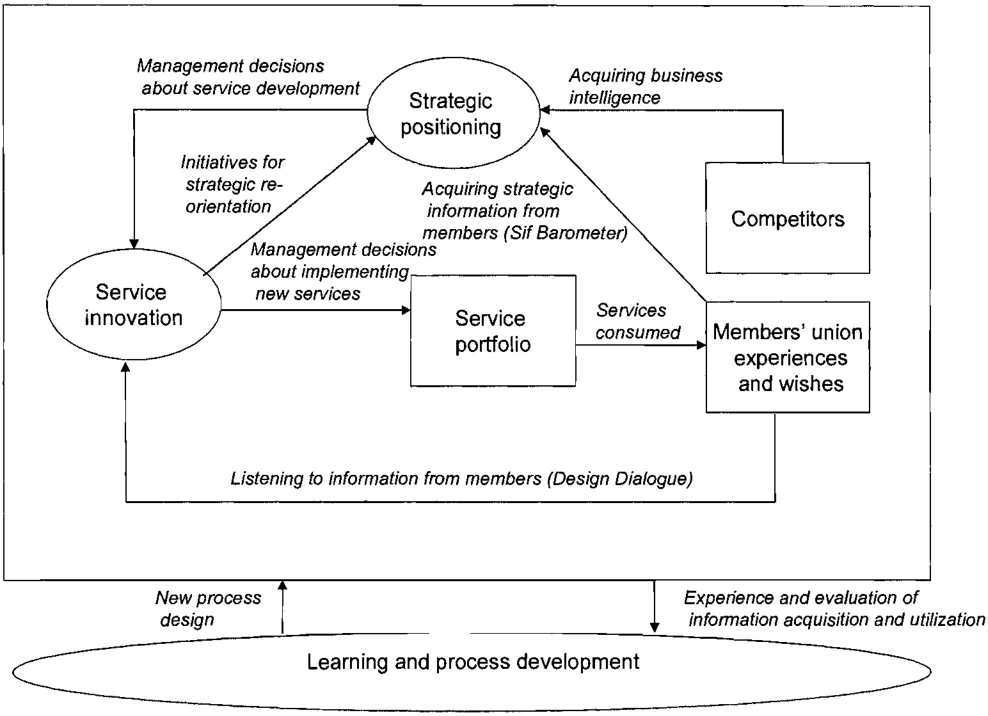
- To what extent are unions capable of utilizing the information gleaned from the application of market orientation for strategic positioning and for innovating their service offerings to the members?
- How can market orientation methods and their use be developed to better contribute to strategic positioning and service innovation in trade unions?

4.4.6 A framework for a learning union

Based upon the discussion on learning above, a comprehensive framework for a learning union can be presented. The core of the framework consists of the model for strategic positioning and service innovation in trade unions presented above (Figure 3). The additional components consist of organizational learning from actual practices and further process development.

The learning and process development cycle concerns learning through reflection on processes in use, and through planning, testing, and evaluating new learning techniques and models. This is closely related to what has been described above as experiential learning and could consist of single-loop as well as double-loop learning. The cyclical learning process relates to process evaluation, concerning data from the strategy positioning and service innovation processes. Moreover, the learning process consists of an elaboration of evaluation data in order to describe and develop alternatives for enhanced positioning and design processes.

Figure 4. A framework for strategic positioning, service innovation and development of market orientation in trade unions.



The framework is developed from the theoretical considerations presented in this chapter, and has been used as a mental model for the research conducted. Thus, the research relates to learning and process development, as I have studied in particular the union's strategic positioning and service innovation processes. In the case of the Design Dialogue Methodology, I have not only adopted a learning and process development perspective, I have also, together with organizational colleagues, used and developed the methodology in real-life design processes. To summarize, the added learning and process development process has obvious implications on all the research questions presented above.

5. Method

This chapter presents my methodological tool-box, consisting of action science, insider action research, and autoethnography. The reliability of the empirical data will be discussed, as well as how I have handled the sources of error in my theoretical interpretation of data and in drawing theoretical conclusions. The chapter ends with reflections on the consequences of the research methodologies chosen, reflections about the actionability of the knowledge created, and brief descriptions of the methodologies used in the different sub-studies.

5.1 A methodological tool-box

This thesis is a report from a process of large scale strategic renewal of Sif. An essential part of that process has consisted of a research project conducted in collaboration between Sif and the Fenix program. Fenix is a research organization, located at the Chalmers University of Technology in Göteborg and Stockholm School of Economics, whose purpose is to bridge boundaries and integrate researchers from many academic disciplines into joint research projects on knowledge and business creation (Adler et al., 2003). I had been employed by Sif for a number of years before the collaborative project started in 2000 as well as during the doctoral studies leading up to the writing of this thesis. During the project, I have played the role of an inside action researcher who has been profoundly involved in the further development and application of the focus group methodology into a technique suitable for use in a union setting. This application is called "Design Dialogue Groups". My own participation as an employee by Sif and being active as a co-developer and user of the market orientation methodologies studied has advantages over more traditional interview studies, conducted by "outsiders" since my position has contributed to a deep understanding and a platform for analyses and inferences. On the other hand, the insider role carries the danger that I may perceive a state of affairs as completely natural or self-evident while an outsider may have experienced these very conditions as highly problematic. To get a more distanced view I have acted as an autoethnographer trying to observe the organization and make sense of what I see in the way of occasionally taking the stance of a "professional stranger" (Agar, 1980). In addition, I have worked as a more traditional academic researcher carrying out interviews, analyzing documents, and re-interpreting data especially from the periodical in-house member-survey called the "Sif Barometer".

However, my research not only has the principal aim of contributing scholarly knowledge but also aims to generate practical knowledge for trade unions. More specifically, the aim of the Sif-Fenix research project is also to collaborate with Sif in developing it as a union offering an attractive and competitive membership package for all white-collar employees in the organization's serviceable job territory at the same time as the members' prospects for democratic participation in the organization is enhanced – or at least not weakened. The goal of contributing to the organization's development forces the researcher to face additional methodological challenges compared to traditional social science research. One is to demonstrate not only that the research meets traditional standards of being scientifically rigorous but also that it is practically useful (or if it turns out to the contrary, to explain why). Another challenge is to demonstrate that my normative value stance of the desirability of Sif goals does not lure me into wishful thinking. A third challenge is not to fall into the cognitive trap of attributing positive developments to my own interventions and negative ones to the interference of unfortunate "freak" contextual events.

In this chapter I explain what I mean by designing a study as action research and the consequences this has for the research process and what sources of error such an approach introduces. I summarize how I have applied action research, how I have taken advantage of the strengths of this approach and dealt with its drawbacks. In a similar way, I explicate how I have adapted Argyris' idea of Action science (Argyris, 1982; Argyris et al., 1985) in my study. I also explain how I have handled the role of being an inside action researcher. Furthermore, I explain how I have dealt with the sources of error in the empirical data upon which I have built my study. Moreover, I discuss how I have handled the sources of error in my theoretical interpretation of data and in drawing theoretical conclusions. The chapter ends with reflections on the consequences of the research methodologies chosen, reflections on the actionability of the knowledge created, and brief descriptions of the methodologies used in the different sub-studies.

5.1.1 Action Research and Action Science

The traditional action research methodology initially proposed by Lewin (1973) incorporates the researcher in a collaborative context which includes problem-solving, collaborative cycles of planning, taking action and evaluating in an organization (e.g. Coghlan, 2001; McNiff, 2000; Eden and Huxham, 1996; Reason, 1994; Babüroglo and Ravn, 1992). In broad terms, action research methodology addresses issues important for the organization studied (Argyris, 1993; Coghlan and Brannick, 2001). First, the methodology involves some kind of change experiments on real problems in organizations. Second, it aims to provide assistance using a number of iterative cycles such as problem identification, planning, acting and evaluating. Third, action research aims to challenge the status quo from a participative perspective and is thus concerned about the change intended. Finally, action research intends to contribute simultaneously to basic knowledge, which not only includes knowledge for the academy, but also the creation of actionable knowledge for the client organization and social action in everyday life. Moreover, action research implies that high standards for developing theory and empirically testing propositions are not to be sacrificed. Of the different action research orientations which have evolved, I have been in particular influenced by action science.

Action science (Argyris, 1982; Argyris et al., 1985) has served as an epistemological basis for my study and has guided its overall design. Action science puts an emphasis on "theories-in-use", in other words that the researcher should help reveal the underlying principles that really explain the behavior of people in an organization and not only take what they "espouse" at face value. The underlying reasons why an organization functions badly often turn out to be related to strategies of control, self-protection and defensiveness (Model I, see Argyris et al, 1985). The researcher can help the organization transcend its unfruitful attention to control by questioning these very habits and, instead, look for innovative solutions. Such a search for new approaches can be fostered by eliciting valid information about why people act as they do, free and informed choice between action alternatives, and commitment to carry them through (Model II, see Argyris et al., 1985).

Action science theory emphasizes rigor in the creation of scholarly knowledge in more detail than that in most writings about action research. However, this does not indicate a weaker interest in the creation of action or actionable knowledge. The specific, normative stance of action science is emphasized, as research results not only have to "pass hypotheses testing" but must also contribute to the creation of actionable knowledge and action. Below follows an attempt to summarize action science, as described by Argyris et al. (1985: 78-79):

- Action science intends to enact communities of inquiry in communities of social practice.
- Action science is directed towards knowledge in the service of action.
- The domain of action science is characterized by the interpenetration of empirical, interpretive, and normative claims.
- Theoretical constructs should be simple enough to be usable, while enabling the actor to grasp all relevant features of the situation. Action science focuses on the meanings and logic of action more than on regularities among contingent events.
- The testing of knowledge claims in action science, as in mainstream science, is guided by the norms of public testing, falsifiability, intersubjective agreement on data, and explicit inferences. In action science these norms are extended to interpretive and normative, as well as empirical, claims. The basis of knowledge claims is the community of practice insofar as it enacts norms for valid information and internal commitment.
- Action science creates alternatives to the status quo and promotes learning concerning norms and values. The normative position is advocated and justified through internal critique.

In my research, the most evident example of enactment of communities of inquiry in the organization relates to the development of the Design Dialogue Methodology. Members of internal project groups have reflected on the practices utilized (Design Dialogue Group sessions and thereafter followed by evaluations) in order to contribute to the further development of the methodology. However, even if the main research efforts have utilized project members as forming communities of inquiry, other areas of the research have been conducted through a community of inquiry consisting of myself and research fellows, conducting research on communities of existing practice in the organization.

An interpenetration of empirical, interpretive, and normative claims is reached when members of the organization are actively utilizing acquired data and hence reflecting on the acquisition and utilization processes. An example of such interpenetration has been the efforts made to evaluate the organizational produceability of service ideas gathered from members in Design Dialogue Groups. During these processes, data based upon individual members' experiences and wishes were interpreted into trade union services and activities, and hence related to technological and normative positions in the organization.

The research has to a considerable extent focused on the meanings and logics of action. This follows from the express aims to study the utilization of market orientation methods – such studies are related to how the organization and its members respond and react to market information. For example, the actions of the management team in relation to Barometer results have been studied.

The actionability of attained knowledge has been secured in different ways. In some cases, data, interpretations, and analyses have been exposed to organizational members in order to attain their comments. In the case of the Design Dialogue Methodology, along with discussion in the corridor, the internal project group members involved have been interviewed and have participated in an evaluative seminar. The internal diffusion of the methodology – not endorsed by any managerial decisions – is an indication of the perceived actionability of the methodology developed and refined in collaboration with internal communities of inquiry. These evaluative processes have also contributed internal critique. The normative positions taken by me (such as the importance of listening directly to members) have thus been exposed to criticism and discussion.

5.1.2 The insider action researcher

The epistemological perspective of this research project needs to be complemented by a concrete methodology and techniques that can be used in the practical research work. In this respect I have been influenced by the ideas of clinical inquiry, insider action research, and ethnography.

Stymne (1970: 25) uses "...the term clinical organization research to denote research aimed at simultaneously solving organizational problems and acquiring increased knowledge about the way organizations function". Schein (1987: 11) has defined clinical researchers as "those helping professionals who get involved with individuals, groups, communities, or organizations in a 'helping role'". A typical clinical project starts after the client has chosen the clinician and may end when results are not considered to be usable in the organizational setting. The critical distinguishing features of the clinical model of inquiry are (1) that the experience in the culture(s) reflexively to "bend backwards" on the self and look more deeply at self-other interactions (Ellis and Bochner, 2000: 740). The researcher's experiences are in focus using confessional tales (Van Maanen, 1988) of what went on at the backstage of doing research, combined with narratives of the author's experiences, to be incorporated into the description and analysis of others emphasizing the dialogue between the author and other members (Tedlock, 2000).

The empirical starting point is thus my familiarity with the setting. As an insider, I am potentially better positioned than outsider researchers when it comes to revelation of "the true story". However, this approach may be risky, as problems and difficulties of an intellectual and political character may occur. In worst cases, the results may provide no more than personal idiosyncrasies and flattering, "politically correct", accounts. Thus the importance of dealing with taken for granted assumptions and blind spots calls for an ambitious struggle with personal and cultural frameworks. The most explicit utilization of the auto-ethnographic methodology is revealed in Paper 2.

5.2 Collection of and reliability of empirical data

The thesis is based upon empirical data of many different characters. A brief description shows the variety of data utilized.

Background data have been collected from an array of available sources. Internal written sources have included minutes from the National Executive and Annual Reports (1990-2003) and documents such as Action Programs and the Program of Ideas (Sif, 2000; 2000a). These sources were – along with ethnographical observations – especially important for the writing of Paper 1 on "membership interface unionism". In that study, comments from Sif colleagues on draft versions of the article were essential.

During the development and utilization of the Design Dialogue Methodology, documentation from 35 sessions have been collected and utilized. All sessions have been video recorded and were followed on a TV-screen by Sif employees. Video recordings have thus been available for research efforts and comments from Sif employees involved have also been used. Evaluations undertaken by approximately 225 participants in 32 of these sessions have contributed to the assessment of the methodology. These evaluations have concerned issues such as opportunities to make oneself heard, group involvement in the task, group creativity, individual involvement in the task, individual creativity, and the quality of the exchange of ideas and experiences. A specific survey to participants in 12 Design Dialogue Groups and to service developers involved in these groups contributed with assessments of the usefulness, originality, and produceability of the approximately 140 service ideas acquired. Another survey related to the usefulness and produceability of service ideas derived from Design Dialogue Groups with managers was also sent to all managers in the organization. The survey results were then discussed in an internal seminar with four managers. Moreover, many project group meetings have contributed to the development of knowledge derived from Design Dialogue Group participants as well as to methodological development.

In order to contribute more specifically to the assessment and further development of the Design Dialogue Methodology, five interviews with internal service developers involved in the Design Dialogue Process have been conducted. A specific internal seminar with six service developers has contributed further to the assessment and development of the methodology.

For the Barometer study, results from the Sif Barometer (about 4 000 telephone interviews annually) and analyses elaborated from these results have been available via the Internet or as written documents. Data on log-ins on the Barometer homepage have provided information on its utilization. Evaluation questionnaires have been used twice to assess the importance of a chosen set of Barometer information, as perceived by the members of the management team. The questions posed concerned how much Sif had done to solve the stated "problem", the importance of prioritizations to "solve" the stated "problem" and perceptions of the management team's willingness to prioritize action to "solve" the stated "problem".

Interviews with current and former elected representatives and Sif employees have contributed data to the Barometer study. In total, three interviews have been conducted with elected representatives (the President of Sif and two regional Presidents), 14 interviews with managers in the organization, and one group interview with employees at the headquarters have been conducted.

The opportunities to make ethnographic observations have been excellent, as I have spent most of my working hours inside the organization. However, such observations have in normal cases not been compiled on any strict basis. Therefore, ethnographic observations have predominantly served as indicators guiding my research process and analysis of data. The exception is the study on political entrepreneurship in insider action research (Paper 2), which is based upon a more elaborate utilization of autoethnographic data, expressed as reflections on my own and organizational practices.

5.2.1 Reliability and treatment of possible sources of errors and misinterpretations

Reliability is a measure of the extent to which data can be considered consistent (Sjoberg and Nett, 1968: 298) and stable and the degree to which repeated studies lead to the same results (Dahlsten, 2004: 52; Remenyi et al., 1998). For example, in quantitative research, the reliability in measurement procedures is evaluated in order to determine how much of the variation in scores among individuals is due to inconsistencies in measurement (Selltiz et al., 1959). Such traditional reliability considerations are not directly applicable in qualitative research projects. Reliability measures presuppose quantitative measures and replicability. These conditions are rarely at hand in action-orientated projects. The data generated in an action project consists of descriptions and narratives of the actions undertaken by the researcher(s) and the internal actors. In addition, the actions cannot be expected to exhibit regular stimulus-response patterns since each action is designed to handle problems and opportunities occurring in specific situations during the research/change project (Roth, 2002: 39). The studies conducted are not replicable, as identical circumstances will never occur. Therefore, the concept of reliability has to be differently interpreted in qualitative studies. I would suggest the following definition of reliability:

> The extent to which observations made are representative of the processes studied and to which the researcher has taken sufficient care to counteract the sources of error inherent in the methods used for establishing empirical facts by extracting, observing, recording and interpreting information from or about the object of study.

Below I will comment on how I have dealt with the potential sources of error so that I can obtain sufficiently reliable data on which to build my reasoning and conclusions.

5.2.2 Representativity and relevance of gathered data

The main assurance against making observations and gathering data that do not reflect the reality of the organization and its actors is the knowledge that I have as an insider of the organization. The insider role enables pre-understanding on organizational issues, formal and informal decision-making processes and cultural aspects of the organization. In addition, the insider role involves primary access defined as the ability to get into the organization and be allowed to undertake research. The role also involves secondary access by providing opportunities to have access to specific parts of the organization that are relevant for one's research (Coghlan and Brannick, 2001: 51-54).

In addition, I have strived to strengthen reliability through "triangulation", that is requiring that an empirical datum has been indicated by more than one source of information. Moreover, the information has also been generated by many different research methodologies. Data have been collected through internal written sources, individual and group interviews, internal evaluative seminars, questionnaires and quantitative studies.

5.2.3 Guards against traps for the insider action researcher

I have argued above that the knowledge of the insider is an advantage in terms of understanding what are relevant issues for the organization studied and what information reflects what is typical and representative for the organization, However, the pre-understanding of the insider may also involve disadvantages, in particular being close to data may give the researcher the impression that he or she already knows "all the answers".

Since I share the main values of the organization I work for and since I have worked for the organization as an action researcher for realizing these values, I have to be aware of not engaging in wishful thinking that makes me perceive my organization's behavior as an expression of these values rather than searching for other explanations. I also have to be aware of the common cognitive trap of attributing positive performance to my own actions while attributing non-desired outcomes to factors outside my control.

The main guard developed against these traps is to use the tension between the roles of the insider and an outsider as a check and control. This tension has been exploited by asking an experienced social scientist to carry out interviews and make observations in the organization and then discuss differences in perception. Another way is to expose my observations and interpretations to the critique of other researchers both in informal conversations and at formal seminars. Yet another way to distance myself from the taken for grantedness of my organization is by regularly moving into the role of an outsider academic researcher by physically spending time at my university, writing academic articles and engaging in a dialogue with academic colleagues.

5.2.4 Combining Insider and Outsider Roles

Bartunek and Louis (1996) have described insider/outsider team research as joint relationships between outsider researchers and organizational members. A well-conducted insider/outsider research project may result in the uniquely insightful vantage of the third person. Thorstein Veblen expressed this as "Marginality – the quality of being neither altogether inside nor altogether outside the system – informs the intelligence and gives the marginal man [sic] the third eye that penetrates the culture as no insider could" (cited by Bennis in Handy, 1991: ix). In insider/outsider research the assumptions, language and cognitive frames of the insiders and the outsiders are made explicit in their respective questions. In this study, the main researcher is an insider, partially adapting to the outsider role, as each researcher is participating in an external community of inquiry (Argyris et al., 1985), the research community, and constantly uses "complete outsiders" from this society to challenge insider assumptions.

The role duality of the insider action researcher – as practitioner and researcher – is one important factor behind the specific role of change agent that is played by him or her. Access to the organization, pre-understanding and the opportunities to execute political entrepreneurship from a platform given through being an organizational member are some of the factors distinguishing the insider action researcher from the more traditional action researcher.

The participation of outsider researchers in data collection and analyses has contributed to an enrichment of perspectives and "control against going/staying native". The utilization of data and the presented findings have been commented on by internal actors in the organization.

5.3 Validity of theoretical explanations

Validity can be described as the extent to which observed differences reflect true differences among individuals, groups, or situations on the characteristic which is sought to be observed or true differences in the same individual, group, or situation from one occasion to another (Selltiz et al., 1959: 155). It "refers to the adequacy of data relative to a given set of hypotheses" (Sjoberg and Nett, 1968: 298). Validity in qualitative research has to do with description and explanation and the extent to which the explanation fits the description (Janesick, 2000: 393). Thus, one issue of validity concerns the conflation between method and interpretation (Lincoln and Guba, 2000: 178). Validity in qualitative research can therefore be assessed in terms of the credibility of explanations provided and how well explanations fit the theory (Janesick, 2000: 393; Sundgren, 2004: 72). Action research must meet the same standards of research rigor as more “mainstream" approaches (Eden and Huxham, 1996). Action science, as described above, puts the standards somewhat higher: "... the ground of knowledge claims in action science is the community of practice insofar as it enacts norms for valid information, free and informed choice, and internal commitment." (Argyris et al., 1985: 79). This means that valid knowledge has to correspond to criteria such as meaningfulness, usefulness and norms in the studied community of practice, as well as to criteria concerning traditional research rigor.

However, the validity of scientific knowledge claims is established not only by showing that it has created alternatives to the status quo that the community of practice can and wants to enact. A prerequisite for the claim according to Argyris et al. (1985) is, however, that the reliability of the empirical findings has first been established. In addition to showing, as I have above, that the empirical facts are reliable, two conditions have to be fulfilled to establish valid theoretical explanations:

- That they generate an alternative to the status quo in the organization studied;
- That the organization is capable and has the commitment to put the new knowledge into action.

5.3.1 Ascertaining the research contribution: an alternative to the status quo

As a staff member of Sif, I have established a platform of access to the organization, and have a pre-understanding that has given me opportunities of being an action researcher and executing political entrepreneurship. I have seized such opportunities in my day-to-day work. Even if these interventions have most often not been in any sense spectacular, they have permitted me to observe and reflect on the response – resistance or approval – they have generated. The major intervention element in my research is the development of the Design Dialogue Methodology together with practitioners in the organization. This intervention is well documented, and the documentation as such contains process reflections by me, a fellow researcher, and the internal utilizers/co-developers of the methodology. Interventions in respect of the Barometer utilization have revealed new knowledge on the mechanisms for utilizing or not utilizing strategic information. The understandings that my interventions have generated have been an important input to the articles as well as the theoretical reasoning in the summary section. For example, my conclusions on learning capability and capability for undertaking strategic change have to a large extent been induced from the feedback and reflections on such interventions.

The perception of knowledge in a studied community of practice is not only dependent on one's research results - how the research has been conducted is also of the utmost importance. One of the studies here (Paper 2) concerns the role of insider action researchers. As such, the focus is on the process of establishing and maintaining an insider researcher role which enables the researcher to create new knowledge of high relevance to both the academic community and the organization. The results from the study have been used and further elaborated by the co-author of the study (Sundgren, 2004). The study provided further insight and knowledge concerning the insider action researcher role in long-term research processes.

The main finding from the study is that to initiate and facilitate durable long-term action research projects, several enabling actions and behaviors are connected to what can be defined as political entrepreneurship. The results thus emphasize the importance of filling the research gap in respect of organizational politics and political entrepreneurship in action research theory.

The political entrepreneurship activities described in the article imply a behavioral repertoire of political strategies and tactics, and a reflective, self-critical perspective on those political behaviors, which in the context of insider research means a pre-understanding of the organization's power structures and politics. This kind of entrepreneurship is needed to enable one to conform to political conditions without compromising the action research projects or the researcher's own career within the organization.

In accordance with action research methodology the study has involved 35 experiment-like trials with Design Dialogue Groups. They have involved a number of iterative cycles such as problem identification, planning, acting and evaluating. These experiments have had the appearance of a normal event that could happen in the organization. The outcomes of these trials are therefore a valid indication of what could happen if the Design Dialogue Groups were to become a standard procedure in the organization.

Moreover, theory has contributed to the development of research approaches and the evaluation of findings. My role as an insider researcher, my closeness to the organization studied, the high degree of involvement of organizational members in the process, and their understanding and acceptance of the study results, are all positive indications that the knowledge created has been meaningful, useful and can serve as action norms for the organization. To conclude, the research conducted has met the criterion on the generation of an alternative to the status quo in the organization studied.

5.3.2 Organizational implementation: capability and commitment

My role, as "insider", employed by the organization for many years, has, since I became a doctoral candidate, been "mediating" in its character. Thus, the organization acquires knowledge through participation in investigations, interventions and critical reflections. The managerial decision to involve the organization in the reported renewal project is an indication of the interest and commitment needed to acquire new knowledge. However, a capacity and commitment to utilize the new knowledge is something different – and shifts the focus onto the value and usefulness of the research conducted in the organizational setting.

As to the Design Dialogue Methodology, its diffusion in the organization is a clear indication of a fit between the new knowledge and organizational capability and commitment. Since the collection of data for this thesis has ended, the methodology has been utilized on several occasions and plans for 2005 include further diffusion and development of the methodology.

The Sif Barometer is currently undergoing a process of redesign, following the organization's adoption of a new Action Program late in autumn 2004. This redesign process is aligned with the knowledge presented in this thesis and I have been utilized as a resource during this redesign process. Thus, the organization has proved its capability to change the construction of the Barometer. The capability and commitment to utilize the new results are, however, still unproven. As will be argued further on, improved utilization of Barometer results calls for enhanced methodological knowledge and an avoidance of negative political behaviors. Interestingly enough, the actionability of these research contributions in Sif is highly dependent on organizational politics.

To conclude, the research conducted has met the criterion concerning the organization's capability and commitment to put the new knowledge into action.

5.4 Methodological approaches of the sub-studies

The main methodological features of each subproject are listed below. More details on the methodology can be found in the appended papers.

The trade union role study (Paper 1) aims at providing an understanding and positioning of Sif as a union – expressed by the "member interface unionism" concept. An ethnographic approach (Schein, 1987) is used. The study has been conducted by myself as an insider in collaboration with an outsider researcher. My insider role and long experience of being employed by the organization provided experiential data and knowledge about and access to internal sources. The outsider researcher has contributed not only with his research experience and knowledge of the overall subject, but also through questioning my "taken for granted" inferences. Thus, the quality of the study is significantly enhanced through insider/outsider collaboration. The involvement of former and current Sif employees has also contributed important inputs and corrections to earlier draft versions of the paper.

The role of internal researcher study (Paper 2) relates to experiences gained by me and a fellow insider researcher. The methodology used is inspired by collaborative autobiography (Goldman, 1993), reflexive ethnography (Ellis and Bochner, 1996), and self-ethnography (Van Maanen, 1995). The study involved me as a Sif insider and the co-author Mats Sundgren as an AstraZeneca insider. Colleagues in both organizations were used as insider experts, helping us to develop our findings from our own experiences. During the research/writing phase, Mats and I simultaneously acted as outsiders in relation to each other, and outsider researchers were also involved. The study as such is closely related to what we have found to be a neglected issue in action research, namely the role played by the researcher as a political entrepreneur/change agent. As the results concern methodological issues, they will be discussed further below in this chapter.

The learning from member satisfaction surveys study (Paper 3) concerns the utilization of a member satisfaction survey and uses a clinical approach (Schein, 1987). When conducting this study, my role as an insider researcher has been important, as it has enabled me to gain access to information and people. Employees in the organization have only to a marginal extent been involved in the research effort – but they have been rather more than simply providers of information. In respect of the framework presented in Figure 5, I have, as a researcher, been involved in learning and process development in order to attain the results presented. These results will be used as an important input in a process aimed at developing and introducing a new planning and evaluation system. I will participate in this process with the aim of utilizing the proposed design principles as inputs to what will possibly emerge as an organizational change process closely related to action research methodologies.

The Design Dialogue Methodology study (Papers 4, 5, 6) is an on-going action research/organizational change project, and the papers are reports written during different phases of this project. The approach adheres closely to the action science principles presented above, as the community of practice (Sif service developers) is engaged as a community of inquiry in the developmental, testing and evaluative processes described. My proximity to the organization studied has resulted in proposed design principles which are easily understood by the organizational members involved. As the papers presented are reports from an on-going project, further testing and refinement of the proposed design principles will take place. The adherence to clinical inquiry methodology (Schein, 1987) is obvious, as the methodology presented by the papers has been developed in real-life settings, in order to contribute to solutions to problems perceived by the organization. In relation to the above described framework for strategic positioning, service innovation and development of market orientation (Figure 5), the study can be described as based on interventions in the design process, and the results have been found when I, as a researcher, together with organizational members, have engaged in learning and process development.

6. A brief summary of the studies conducted and papers appended

The chapter briefly presents the studies conducted and the research reports written.

The research questions in this thesis are the following:

- To what extent are unions capable of utilizing the information gleaned from the application of market orientation for strategic positioning and for innovating their service offerings to the members?
- What factors have been especially difficult to overcome in applying market orientation methods in a union setting and what factors have facilitated their use?
- How can market orientation methods and their use be developed to better contribute to strategic positioning and service innovation in trade unions?
- What general inferences can be drawn on the design and application of market orientation methods that are useful in trade unions?

This chapter aims to present the studies conducted and points out connections between these and the research questions of this thesis. As the results of the studies are used as integral parts of the thesis, more specific information from the specific studies have been used above and will henceforth be used and referred to.

The thesis is based upon four different studies, presented in six appended papers. The first study (Paper 1) is taken up in the introduction chapters of the thesis, while the second study (Paper 2) has contributed a background to parts of the method chapter. The two final studies (Papers 3-6) will be more thoroughly presented in the following chapters.

6.1 The Trade union role

This study has resulted in Paper 1: *Member Interface Unionism: A Swedish Union in Transition*. The paper describes the emergence of a new configuration of unionism. It contributes a platform for Chapters 1 to 3 and for the research questions presented above. In the paper, collective and individual services are discussed, as well as participation in trade union activities. The description given of Sif argues that both collective and individual services are essential in the Sif service package and that market orientation methods have contributed to the development of the organization. The fact that participation has declined, despite a distribution of responsibilities to local union bodies, is pointed out as a challenge for the union. The study was conducted through insider/outsider research. Written sources have been utilized and practitioners have participated in an intense iteration in order to refine the concepts utilized.

6.2 The internal researcher role

This study has resulted in Paper 2: *Political Entrepreneurship in Action Research: Learning from Two Cases*. The paper describes factors important for sustainability in insider action research projects. The study contributes to the thesis through its methodological reflection, which is taken up in the method chapter. The paper aims to contribute to the development of Insider Action Research theory, as it develops the political entrepreneurship concept (Buchanan and Badham, 1999) in relation to the researcher's role. Methodologically, the study is inspired by collaborative autobiography (Goldman, 1993), auto-observation (Adler and Adler, 1994), and ethnography (Ellis and Bochner, 1996); it is based upon self-reflections on the role of the internal action researchers.

6.3 Learning from member satisfaction surveys

This study has resulted in Paper 3: *Customer satisfaction studies as tools for strategic positioning. A case study*. The paper describes the perceived credibility and usefulness of results from a customer satisfaction study, and problems related thereto. Critical success factors, treated as design principles related to learning from member/customer satisfaction surveys, are identified as survey design clarity, result actionability, involvement in survey design processes, methodological knowledge and internal politics. The study was conducted as insider research. Interviews, quantitative evaluations, studies of activity plans, budgets, and survey results were utilized in the research process. The study is closely related to all research questions formulated in the thesis.

6.4 The Design Dialogue Methodology

This study has resulted in three papers. The study, and the papers, relate closely to all the research questions of the thesis.

Paper 4: *Service Innovation. A collaborative approach* is a report from an ongoing action research project. The report describes the development and evaluation of a pilot version of the Design Dialogue Methodology and provides a basis for understanding the methodology. Important findings relate to the properties of concepts and ideas acquired from participants in group sessions – the union is not only a service provider but also a provider of relational platforms – and to the evaluation of the method as being useful in the trade union setting. Methodologically, it is an action research project utilizing Design Dialogue Group sessions, group interviews, and quantitative evaluations as research sources.

Paper 5: *Design Dialogue Groups as a Source of Innovation: Factors behind Group Creativity* is a report from the same ongoing action research project. The paper describes creativity in Design Dialogue Groups and proposes design principles related to group creativity. These design principles are rather straightforward propositions related to three critical factors for group creativity:

domain-relevant skills, creativity-related processes, and task motivation (Amabile, 1996). Methodologically, it is an action research project utilizing Design Dialogue Group sessions, group interviews, and quantitative evaluations as research sources.

Paper 6: **A** *Strategy for Enhancing Trade Union Learning from Members* is also a report from the same ongoing action research project. The paper describes project group learning from Design Dialogue Groups and proposes design principles related to learning from members/users. The organization has shown a weak capability to elaborate on and utilize the concepts and ideas acquired from the Design Dialogue Groups. The role of the organizational team involved is proposed to be developed in order to enhance documentation, elaboration, and hence, usefulness and utilization of the results acquired. Methodologically, it is an action research project utilizing Design Dialogue Group sessions, group interviews, and quantitative evaluations as research sources.

Table 4. Studies, articles, content, and contributions.

Study	Article	Content	Contribution to Chapter(s)	Contribution to answers to research question(s)
A. The trade union role	1. Member Interface Unionism: A Swedish Union in Transition	Describes the emergence of a new configuration of unionism.	1-3, 7,10	1, 2, 4
B. The role as internal researcher	2. Political Entrepreneurship in Action Research: Learning from two cases	Describes factors important for sustainability in insider action research projects.	5	-
C. Learning from member satisfaction surveys	3. Customer satisfaction studies as tools for strategic positioning. A case study.	Describes perceived credibility and usefulness of results from a customer satisfaction study, and problems related thereto.	7-10	1, 2, 3, 4
D. The Design Dialogue Groups	4. Service Innovation. A collaborative approach.	Report from an ongoing action research project: describes the development and evaluation of a pilot version of Design Dialogue Groups.	7-8	1
	5. Design Dialogue Groups as a Source of Innovation: Factors behind Group Creativity	Report from an ongoing action research project: describes creativity in Design Dialogue Groups.	7-8, 10	1, 2, 3, 4
	6. A Strategy for Enhancing Trade Union Learning from Members	Report from an ongoing action research project: describes project group learning from Design Dialogue Groups.	7-8, 10	1, 2, 3, 4

7. Are unions capable of utilizing market information?

The chapter presents the two market orientation methods studied and evaluates their organizational impact. Both methods have contributed to enhanced market orientation. The Barometer has had an impact on strategic positioning, while the Design Dialogue Methodology has contributed to service innovation. With respect to the latter, problems of dissemination and utilization of results have been identified. The chapter concludes with an exploration of trade union characteristics as factors possibly hindering or enabling the accurate utilization of market orientation methods for service innovation.

This chapter aims to answer the following research questions:

- To what extent are unions capable of utilizing the information gleaned from the application of market orientation for positioning the union strategically and for innovating their service offering to the members?
- What factors have been especially difficult to overcome in applying market orientation methods in a union setting and what factors have facilitated their use?

Initially, it seems meaningful to briefly discuss trade union characteristics that might make market orientation methods difficult to adopt (see 3.3 above). The first factor mentioned was related to the complex governance structures of trade unions. A high proportion of the input from users/members is provided through member participation in organizational activity and representation in decision-making bodies. This representative system may potentially hamper the utilization of market orientation methods. The potential problem can be described as a presumed preference to listen to the elected representatives instead of "listening to the market", i.e. using market orientation methods to listen to and learn from members and potential members.

The dominant opinion – manifested not least through the Sif Executive's interest in survey results – has been that survey results provide important factual information, which the elected representatives, being responsible for overall decision-making, interpret and use as an important input and basis for decisions. Hence, no conflict between the representative system and the administrative system has been traced.

The first issue in this chapter is the examination of the market orientation methods studied and their respective contributions to strategic planning and service innovation. The second issue is that of exploring trade union characteristics as factors possibly hindering or enabling the accurate utilization of market orientation methods for service innovation.

7.1 The Sif Barometer

7.1.1 A presentation of the Barometer

Sif has used membership satisfaction surveys as a performance evaluation tool for several years. This study focuses on the use of the Barometer, a telephone interview survey conducted once a year with about 4 000 randomly selected members as respondents. The survey results are accessible to all Sif employees as descriptive statistics in a web-based interactive database and more elaborate analyses as documents held on an internal server.

Important issues measured by the Barometer are related to the union's performance regarding salaries, pensions and other financial benefits, the work environment, the development of competency and skills, health and safety, financial growth, service quality and trade union visibility. The size of the interviewed population allows for the production of information with some statistical precision, even when not too narrow sub-groups are studied.

The questionnaire consists of about 110 items (including background variables), developed through member involvement in focus groups and in collaboration with internal experts in different areas. Data is collected by a market research company through telephone interviews with 200 randomly selected members in each region. The response rate in 2004 was 69%. Compilation of descriptive data and analyses are conducted by the same market research company. Descriptive Barometer data are available on the Internet to all Sif employees. Selectable background variables in the database include region, membership of local union branch, sex, age, managerial position, occupation, industry sector, education, membership status, years as member, and salary. Moreover, comparisons can be made over time. The coverage of specific service areas are exhibited in Table 5 below.

Table 5. The Sif Barometer, service area coverage.

Service areas	**Number of items**
Services to the unemployed *Example: "How would you evaluate Sif's activities towards unemployed members?"*	9
Salaries, pensions and other remunerations *Example: "Sif provides the service I need on wage statistics."*	16
Support/fair treatment *Example: "When I have a work-related problem, Sif is there to help me."*	7
Work environment *Example: "How would you evaluate the organization's efforts on work environment issues?"*	10
Development of competency and skills *Example: "Sif is a career coach, giving career advice."*	15
Economic growth *Example: "The local Sif branch has a major influence on the development of my company."*	3
Service quality *Example: "Did you find it easy or difficult to get in contact with the person you needed at the regional Sif office?"*	6
Participation in trade union activities *Example: "How interesting to you are the activities you are invited to by the regional Sif office to take part in?"*	12
Membership value *Example: "I consider Sif membership to be good value for money."*	3
The organization's visibility *Example: "Sif is a visible organization where you work."*	8
The organization's image *Example: "Sif is a modern trade union."*	4
Loyalty intentions *Example: "I am not considering leaving Sif for another trade union."*	2
Overall satisfaction *Example: "How satisfied are you with your membership?*	4

More elaborate analyses are conducted in order to produce performance/impact matrices, in which the organization's performance in prioritized areas is related to their impact on overall satisfaction, loyalty intentions and the organization's image. The performance measures (the degree of satisfaction among members with union activities in each strategic area) are built upon several items covering each strategic area. Ten-digit scales have been used. The impact measures (the perceived importance of union activities) are statistical measures (latent variables) that have been calculated with the use of multiple regressions. Principal Component Regression (Johnson and Gustafsson, 2000) has been used in order to define these latent variables related to strategic areas.

Table 6. Overall satisfaction, calculated impact measures (2004).

Strategic area	**β (Impact)**	**Sign.**	**Eigenvalue**	**Average score**
Salaries, pensions and other remunerations	.104	.061	4.882	5.19
Support/fair treatment	.267	.000	2.299	6.43
Work environment	.136	.136	4.479	4.46
Development of competency and skills	.048	.468	4.432	4.86
Economic growth	.003	.964	2.160	4.19
The organization's visibility	.346	.000	2.717	5.05

The principal component regression model, when these latent variables are utilized, explains 62% of the variability (R^2) when satisfaction is used as a dependent variable, while the model explains 46% of the variability when loyalty intentions is used as a dependent variable and 72% when image is used as a dependent variable.

The original purpose of the Barometer was to provide information on members' perception of the value of membership. It was the major assessment tool for strategic objectives in the organization's Action Program. Today, the Barometer has dual purposes, as its original purpose has been combined with its utilization as a tool for planning and evaluations at the operational level. The strategic data acquired consist of information related to importance and performance in specific service areas. The information used at the operational level mainly relates to members' perceptions of performance and importance for specific service sub-areas – such as information on salaries or insurance offerings. In most cases, specific services are not evaluated by the Barometer. Thus, it is still an instrument for strategic positioning – its utilization at the operational level should be perceived as an instrument for strategic fine-tuning rather than service innovation.

The Barometer is stated by Sif managers to be a very important tool for planning and evaluation. Barometer results – both descriptive and from analyses – are presented annually to the management team and the union's National Executive Committee. However, the actual importance of the Barometer can be questioned, as its results have only to some extent led to strategic reorientations.

7.1.2 Learning and process development: How has the Barometer contributed to strategic positioning and service innovation?

As shown above, the Barometer has provided information that has possibly strengthened the organization's knowledge both on its image, satisfaction levels, and loyalty intentions among the membership as a whole and among specific groups of members. Contributions from the Barometer have concerned members' attitudes towards the organization and their levels of satisfaction in different service areas. It has also to some extent provided information on member behaviors in terms of the utilization of trade union services.

As described above, the original purpose of the Barometer was to provide information on members' perception of the value of membership. It was intended to be used by all managers and employees in the organization as the major tool for assessing strategic objectives set out in the organization's Action Program.

The Barometer has been important for strategy development in some areas, but not in others (Paper 3). It has pointed out the organization's visibility as the most important area to prioritize – and this area has been accordingly prioritized by the management team and by many organizational units. This has resulted in efforts to make the organization's aims and activities better known, not least through national advertising campaigns. Moreover, the organization's visibility at the company level has been targeted in a major project organized at regional level. However, other important strategic information, revealing for example that a majority of the members believe that their union membership has no impact on their salary level, has been more or less neglected.

A new Barometer questionnaire is developed every fourth year, when a new Action Program is adopted by the Congress. Barometer results are hence presented and used annually for operational and strategic assessments and planning. Process owners and management team members have assessed that the production of Barometer results once a year has been a suitable frequency for assessment and development at the strategy level. However, when the Barometer is utilized for operational planning and assessment (on a one-year basis), changes in results from one year to the next are often very minor, and this has been perceived as making the information less useful.

The information obtained has both confirmed and disconfirmed organizational assumptions. This means that the content of the information has been limited by the chosen research model. Hence, no completely new trade union issues or specific service ideas have been presented in the results. Information disconfirming existing assumptions, for example the fact that members with a local union branch are less satisfied than those without, has largely been neglected, not least for organizational and political reasons (Paper 3). The management team has tended not to react to information, as resources have been tied up and new prioritizations have been perceived as hard to impose and implement. Political behaviors, such as "keeping silent" in the management team on poor results have also been traced.

Assessments of competitors' strengths have been made through other studies. Hence, the rather limited information on competitors obtained by the Barometer has not been particularly well used.

Most Barometer results have been easily accessible for all employees, but their utilization has been limited (Paper 3), in spite of the fact that many objectives have been measured by the Barometer. Senior management and staff of the National Secretariat have utilized the Barometer search engine scarcely (Paper 3). Information has been disseminated properly, but, from time to time, rather late in the evaluation/planning process. The major problems found have been related to the learning from the results, or responsiveness to market intelligence. Responsiveness requires accurate information, knowledge, interest and ability to act upon the information. The Barometer has provided accurate information for strategic development. All strategic information has been accessible for managers, but sometimes too late in the assessment/planning process. Managers have lacked sufficient knowledge about the survey and the used/available analytical methods. They have also lacked to some extent the knowledge, instruments or power to implement strategic changes. Political behaviors, such as active neglect of Barometer results, have indicated a low degree of interest in implementing changes.

A second Barometer purpose has emerged, as its original purpose has been combined with the utilization of the Barometer as a tool for planning and evaluation at the operational level with a one-year planning horizon. Operational objectives have thus been formulated in terms of Barometer measures. A typical objective has been of the following character: "In 2003, the level of satisfaction with given salary advice shall be at least 6.2". The mixed purposes of the Barometer have resulted in information that is not suitable for operational development (Paper 3). The distributed information has thus provided assessment measures but no guidance for further development – and this has caused frustration. To some extent, more useful information could have been attained through further analyses of Barometer results, but such utilization has been restricted by the limited level of methodological knowledge among the managers and staff. In one specific area (competency issues), useful information has been collected, but this has been poorly utilized, due to there being limited knowledge on opportunities for extracting specific information from the Barometer. This indicates that the purposes of individual market orientation efforts need to be specified. However, specific difficulties related to utilization of the Barometer at the operational level will not be dealt with further in this thesis. In respect of the utilization of the Barometer for strategic positioning, it might, though, have been the case that the attempts to utilize the Barometer for operational purposes have blurred perceptions of the strategic importance of Barometer information.

What is the impact from the Barometer on service innovation? Interviews have not revealed that the Barometer has been a source of creative ideas. As the Barometer has been used to define important activity and service areas, as well as new target groups, Barometer information has contributed to the definition and delimitation of fields of innovation. Examples of such areas are enhanced visibility and attractive membership for managers. It is important to realize that service innovation may be constrained by strategic positioning – as the purpose and function of strategic planning is to make choices. The Barometer may have played such a role, as it has only evaluated existing activity and service areas, and moreover, as only existent members have been used as contributors of information.

To summarize, the Barometer has had a role in strategic positioning, but not fin service innovation. This is in accordance with what has been expected and described by the theoretical framework presented (See 4.2 and Table 3).

Table 7. The Barometer as an instrument for strategic positioning.

Has the Barometer contributed to...	Extent	Indication
...assessing and managing uncertainty by the leadership's designation of a specific set of goals and futures?	Mixed	Has been used for identification of service areas in need of development and for finding new target groups among members. On the other hand, important information has been neglected (Paper 3).
... long- and medium-term planning?	High	Has been a major tool for planning and evaluations (Paper 3).
...knowledge about organizational performance through general or specific member attitudes?	High	The Barometer is a quantitative measurement tool; the presentation of results has been easy to segment in respect of region, age, profession, sex, etc.
... assessment of directions?	Rather high	At the strategic level, fields of innovation (or fields in need of innovation) have been identified.
... confirmation or disconfirmation of actions taken?	Low	Low knowledge actionability; results of specific activities are not evaluated (Paper 3).
...answers to questions about opportunities and threats?	Rather high	Some specific service areas and member segments have been identified and prioritized in line with analyses of Barometer information (Paper 3).
... competitor orientation, reflected in the revealing of relative satisfaction measures?	Low	The Barometer has not provided any specific measures related to competitor strength. Interviews have not indicated that Barometer measures have been utilized for assessments in relation to competitors.
... the dissemination of market intelligence on an aggregate, strategic level?	High	Data available for all employees, the instrument has been used in planning and evaluative activities on all levels (Paper 3).
... member intelligence generation through the utilization of quantitative methods, and a centralized function?	High	The Barometer is a quantitative survey, administered by a centralized function.
... the distribution of market information useful for strategy development and control?	High	The information has been distributed and used for strategy control, and – to some extent (see above) – for strategy development.
... responsiveness to member intelligence in terms of formulation and assessment of objectives on a union-wide level?	Rather high	Used to formulate and assess objectives at strategic and operational levels. To some extent used for making new prioritizations, resulting in actions. Problematic; insufficient quality of distributed information, insufficient user knowledge (Paper 3).

Table 8. The Barometer as an instrument for service innovation.

Has the Barometer contributed to...	Extent	Indication
... the organization's management of the uncertainty inherent in the design of future services, markets, processes?	Rather low	Has reduced uncertainty concerning future service areas and target groups (Paper 3), which is a strategy issue, but has not contributed to design of specific services.
... short-term action?	Rather low	Has provided input concerning needs for renewal/ development but does not contribute with specific service ideas (Paper 3).
... new service concepts and knowledge on service design?	Rather low	Has contributed only at the innovation field level, which is a strategy issue.
... knowledge of member needs?	Rather low	Has contributed data on attitudes towards organizational performance and on the importance of service areas, but no deeper information on member needs.
... opportunities for members to participate and be appreciated for their individual ideas?	Low	Telephone interviews with no open-ended questions.
... creativity?	Low	-"-
... diverging ideas?	Low	-"-
...development of fields of innovation?	Low	The Barometer has not contributed to specific development in fields for innovation, but has been used for the identification and prioritization of fields of innovation (which is a strategy issue)
... concepts and ideas created by the members?	Low	Telephone interviews with no open-ended questions.
... first hand knowledge through the members' experiences of available alternatives?	Low	Has not contributed any deeper understanding of members' experiences.
... representatives of different functions engaged in dialogue with individual members?	Low	Telephone interviews with no open-ended questions.
... the generation and acquisition of information by the users of the information, i. e. project members?	Low	-"-
... dissemination through bottom-up processes?	Low	Centralized dissemination of results.
... an ability to nurture creative and divergent ideas?	Low	Has not been shown – such ideas are not attained from members during the Barometer process.

7.2 The Design Dialogue Process

In short, the Design Dialogue Methodology is a systematic process that connects members' demands directly to the strategic development of the organization. It includes three different activities, idea generation, idea transformation to possible action programs and confirmed strategic decisions. The Design Dialogue Methodology makes use of task forces, appointed to investigate and suggest solutions to observed organizational problems. The methodology has been developed through collaborative research between Sif and the Fenix Research Program (Paper 4) in order to attain creative ideas and solutions on trade union services and activities. The methodology was initially developed within the framework of a project aimed at developing a more attractive union membership package for managers (Paper 4). The evaluation of the methodology indicated opportunities for its utilization in many different settings in the organization. Subsequent studies have emphasized creativity in Design Dialogue Groups (Paper 5) and learning from Design Dialogue Groups (Paper 6). This section is built upon what has been presented in these three papers.

7.2.1 A presentation of the Design Dialogue Methodology

The Design Dialogue Methodology is built upon a conscious and systematic combination of procedures used during the process. A typical process starts with a decision to establish a project team (task force) recruited within the organization, commissioned to present solutions to important problems, as identified by the union's top management team. The outcome of a task force consists of reports, describing a set of organizational measures, and descriptions of new alternatives or propositions concerning a re-orientation of existing activities and services. The Design Dialogue Methodology has been applied with a wide array of purposes: developing services and activities for managers, mapping of competencies and skills required by members in the engineering and consultancy industries, shaping a virtual community platform for members, development of web-based learning tools and preparation of national negotiating rounds. A typical task force consists of three to eight middle managers and experts from departments that are affected by the problem concerned.

The Design Dialogue Group is a central component in the Design Dialogue Methodology. The organization of the group sessions has been influenced by focus group methodology. This methodology has become popular in market research circles due to its ability to produce rapid results with high face validity involving many participants at a comparatively low cost. The method is friendly and respectful (Frey and Fontana, 1993; Kreuger, 1994). The methodology originates from sociological and mass media research during the 1940s. Robert Merton used the notion "focused interview" for this qualitative method for studies of attitudes, values and complex phenomena that occurred in social interactions in the 1950s (Merton et al., 1990). Some properties are common to most definitions of focus groups (Bormann, 1972): the aim is to collect qualitative data, the participants have something in common, and the discussions have a specific focus, e.g., a film, a specific event, a scenario, a specific notion, or an imaginative theme.

The Design Dialogue Methodology has, furthermore, been influenced by Gustavsen's (2001) concept of "democratic dialogue". The dialogue is considered as a process of exchange: ideas and arguments move to and fro between the participants. Some general rules for democratic dialogue are suggested (ibid, 18-19):

- Dialogue is based on a principle of give and take, not one-way communication.
- All concerned by the issue under discussion should have the possibility to participate.
- Participants are under an obligation to help other participants be active in the dialogue.
- All participants have the same status in the dialogue arenas.
- Work experience is the point of departure for participation.
- Some of the experience each participant has when entering the dialogue must be seen as relevant.
- It must be possible for all participants to gain an understanding of the topics under discussion.
- An argument can be rejected only after an investigation (and not, for instance, on the grounds that it emanates out of a source with limited legitimacy).
- All arguments that are to enter the dialogue must be represented by actors present.
- All participants are obliged to accept that other participants may have arguments better than their own.
- Among the issues that can be made subject to discussion are the ordinary work roles of the participants – no one is exempt from such a discussion.
- The dialogue should be able to integrate a growing degree of disagreement.
- The dialogue should continuously generate decisions that provide a platform for joint action.

A typical Design Dialogue Group has consisted of between four and twelve participants together with a moderator. The group interview duration has been two hours. The group sessions have followed a structured process, and the overall issues have been defined in advance. However, the idea generation processes and the discussions have aimed at the creation of ideas based on the participants' experiences. The moderator has thus had a non-directing role in this respect.

While the majority of focus groups are organized by market research consultants as assignments from the organizations that will use the results, Design Dialogue Groups are organized by the organization to use the data collected in its own developmental processes. Furthermore, the specific properties that distinguish Design Dialogue Groups from traditional focus groups are the following:

- participants are invited to a session by Sif, the organization in which they are members (or potential members),
- the sessions are moderated by a Sif staff member,
- the sessions are generally held in the organization's national or regional offices,
- the sessions not only have the purpose of bringing experiences and ideas to the organization, but also create relations between the participants and strengthen relations between the participants and the organization,
- the sessions are video recorded and followed on a TV-screen by a group of Sif employees in order to enhance learning in the organization, and all sessions are evaluated by the group participants and by Sif staff.

7.2.2 Learning and process development: How have Design Dialogue Processes contributed to strategic positioning and service innovation?

The utilization of the Design Dialogue Methodology has been predominantly connected to different projects aimed at service innovation. The background of the Design Dialogue Methodology is different from the Barometer, as the methodology has not been developed as a result of any specific managerial decisions. Instead, the methodology has been developed as a researcher initiative in collaboration between organizational members (project members) and the research project from which this thesis has been produced. It has been diffused through "word-of-mouth" and has been used and further developed in projects of a different character. At the project level, the Design Dialogue Processes were intended to contribute new ideas and concepts concerning activities and services, created by members or potential members, simultaneously as the participants' attitudes, needs and knowledge on union issues were explored. In short, the intentions have been to listen, learn, and to utilize concepts and knowledge developed within the specific project in which the methodology has been used. A problem identified during the process and expressed in interviews with Sif colleagues involved and at an internal methodology development seminar, was that no clear intentions on the diffusion of results have existed – and that results, as well as knowledge on the method, have been poorly disseminated throughout the organization.

Some specific aspects of the utilization of the Design Dialogue processes for service innovation deserve to be discussed in some detail. The time perspective when the Design Dialogue Methodology has been used has often been quite limited. Design Dialogue Groups have been organized in order to contribute input in specific ongoing development processes. The time from the decision to use Design Dialogue Methodology to the delivery of Design Dialogue results has seldom exceeded three months. Results may be utilized when they are delivered or they may have the potential of being re-used in forthcoming developmental efforts. Hence, a specific time perspective in terms of the utilization of results cannot be specified. However, the case has shown that results have been utilized when they have been delivered in time for utilization in the project involving the Design Dialogue Groups. On the other hand, the re-use of concepts and knowledge in other developmental activities has been limited (Paper 6).

Design Dialogue has contributed concepts and knowledge to the organization. Concepts have then been expressed as service ideas. For example, 12 group sessions involving managers, students and elected members contributed about 140 concepts or service ideas related to the development of the Sif website – and they also evaluated their perceived (user) value of the concepts created. Important service concepts developed by managers were, for example, search engines for easy access to relevant legislation and collective agreements, information on the individual rights and responsibilities of employees, information and advice on salary and contractual issues for managers, and tools for the creation of networks between managers. The knowledge obtained from Design Dialogue Groups has been related to member perceptions of and knowledge concerning individual and trade union rights and responsibilities as well as trade union opinions, activities and services. Equally important has been the knowledge obtained on the extent of possible interpretations of terms commonly used by trade unions.

The recruitment to the Design Dialogue Groups has been aimed at finding "typical" individuals from specific segments or member groups, in order to acquire knowledge and ideas "typical" for that specific group. At the same time, the work procedures of the group sessions have been designed to simultaneously produce creative and "atypical" contributions. In the Design Dialogue Groups, individuals have represented themselves, and the participants have been asked to express their own points of views and ideas, and not try to represent any broader collective. The organizational members using Design Dialogue Group results have predominantly perceived the results as service ideas collected from a few individuals. However, some tendencies to interpret outputs from Design Dialogue Groups as membership opinions have been identified (see the quotation below).

The outcome of service innovation processes are uncertain and are hence inclined to create diverging ideas. This has also been the main intention of the Design Dialogue Methodology. However, in some cases, results have been mainly used to confirm internal knowledge or internally developed concepts – and they have thus had the function of reducing uncertainty.

The utilization of the Design Dialogue Methodology is affected by strategic positioning (and thus by the Barometer), as the frame for developmental work is a strategic positioning issue. In fact, most areas in which the methodology has been used are highly prioritized. The utilization of the methodology is also connected to strategic positioning, as it has been used as one methodology among others in a strategic positioning project (the development of an attractive membership for managers), and Design Dialogue Groups have also been used in order to create conceptual platforms for the development of questionnaires used to ascertain Sif opinions and form bargaining objectives. Thus, the methodology has contributed a kind of pre-assessment of directions. Accordingly, Design Dialogue processes have played a role of uncertainty avoidance on strategic issues. They have also been used to avoid uncertainty at the operational level (on objectives and activities on an annual basis), for example a concept concerning a web based communication platform was presented to members in Design Dialogue Groups.

Design Dialogue processes have not been used to assess market threats or for the assessment of competitors, and the methodology has provided scarce knowledge on how groups of individual members have perceived competing organizations. However, Design Dialogue processes have contributed to the assessment of market opportunities. As described above, when a web based communication platform was developed, participants from 12 Design Dialogue Groups assessed the user value of concepts derived from all groups.

One specific example of a direct connection between Design Dialogue processes and strategic positioning has been found: Design Dialogue results have contributed new action plans and better arguments for negotiations in the Information Technology sector. One of the negotiators has argued that Design Dialogue results may have had too important a role in that setting:

> *...I noticed that, emotionally, I brought my experiences from the Design Dialogue Groups all the way to the negotiation table.....I know that we referred just as often to our experiences in the Design Dialogue Groups as to decisions made by our National Negotiation Conference.*

To summarize, the Design Dialogue Methodology has had the role of service innovation, which is in accordance with what has been expected and described by the presented theoretical framework (See 4.3 and Table 3). However, the methodology has also had some impact on strategic positioning.

Table 9. The Design Dialogue as an instrument for service innovation.

Has the Design Dialogue Methodology contributed to...	Extent	Indication
... the organization's management of the uncertainty inherent in the design of future services, markets, processes?	Rather high	Has provided service ideas and understandings of user perceptions of different trade union issues and terms.
... short-term action?	Rather high	Results have normally been utilized in projects with a duration of 3-12 months.
... new service concepts and knowledge on service design?	Rather high	Many ideas have been created, (but) often confirming views held by organizational members (Papers 4-6).
... knowledge of member needs?	Rather high	Have contributed knowledge on needs of a limited number of members.
... opportunities for members to participate and be appreciated for their individual ideas?	High	Participants have been very positive (Papers 4-6). Individual ideas have been appreciated and ventilated in the group sessions. Participants have been given a gift at the end of the session.
... creativity?	Rather high	Participants have assessed their own and group creativity very positively (Papers 4-6).
... diverging ideas?	Rather high	The divergence among the new ideas has been considerable (Papers 4-5).
...the development of fields of innovation?	Rather high	Results have to some extent been used in the development of fields of innovation, while useful information has been to some extent left unused.
... concepts and ideas created by the members?	Rather high	A wide range of concepts and ideas have been created (Papers 4-6).
... first hand knowledge through the members' experiences of available alternatives?	High	The close connections between the participants and the services concerned have provided first hand access to member experiences (Paper 6).
... representatives of different function's engagement in dialogue with individual members?	Rather high	Project leaders have often been engaged as moderators, and have thus been involved in dialogue with individuals (Paper 6).
... the generation and acquisition of information by the users of the information, i.e. project members?	High	The methodology has always been utilized in projects – and the project members have always been involved (Papers 4-6).
... dissemination through bottom-up processes?	Rather low	Results have been scarcely disseminated outside the project concerned (Paper 6).
... an ability to nurture creative and divergent ideas?	Rather low	This limited capability is a problem (Paper 6). It is proposed that such a capability can, however, be enhanced (Chapter 9).

Table 10. The Design Dialogue as an instrument for strategic positioning.

Has the Design Dialogue Methodology contributed to...	Extent	Indication
... assessing and managing uncertainty by the leadership's designation of a specific set of goals and futures?	Rather low	The methodology has been used in strategic positioning processes (Paper 4). Major utilization not connected to descriptions of goals and futures (Papers 4-6).
... long- and medium-term planning?	Low	Often used in projects (3-12 months duration).
... knowledge about organizational performance through general or specific member attitudes?	Low	Has brought such knowledge to the organization, based upon information from individuals. Responses have not been aggregated to represent market segments, as the methodology has been perceived as not being fit for such purposes (Papers 4-6).
... the assessment of directions?	Rather low	Has not contributed to the assessment of directions, but has created some knowledge on how directions are perceived by members (Paper 6).
... confirmation or disconfirmation of actions taken?	Rather low	The methodology has been used for pre-assessments of the design of a website (Paper 6).
...answers to questions about opportunities and threats?	Rather high	Has contributed tentative answers in terms of service ideas.
... competitor orientation, reflected in the revealing of relative satisfaction measures?	Low	Has not provided satisfaction measures, and has contributed scarce information on how competitors are perceived.
... the dissemination of market intelligence on an aggregate, strategic level?	Low	Results have not been disseminated throughout the organization (Paper 6).
... member intelligence generation through the utilization of quantitative methods, and a centralized function?	Low	The Design Dialogue Methodology is a qualitative method, which has been used in a decentralized manner in specific projects.
... the distribution of market information useful for strategy development and control?	Low	Results have not been disseminated throughout the organization (Paper 6) and have seldom been formulated in order to be useful at strategic levels.
... responsiveness to member intelligence in terms of formulation and assessment of objectives on a union-wide level?	Low	The information acquired has seldom been connected to the formulation and assessment of objectives (Papers 4-6).

7.3 Conclusions on the utility of the methods for the union

7.3.1 The Barometer

The organization has to some extent been capable of utilizing the Barometer and the information it has contributed. It has contributed to strategic positioning and to an enhanced member orientation through annual assessments of the members' perceptions of the organization and its service package. The information has been disseminated in the organization and discussed by the National Executive. Strategic objectives have been formulated and assessed on the basis of the Barometer. The Barometer has also contributed arguments for strategy decisions – and it is most likely that it has been important in this respect – on several occasions. Accordingly, assessed in relation to the typical features of strategic positioning tools (Table 7), the Barometer has contributed rather well by supplying information for strategic decision-making. Using the terms of the model for strategic positioning and service innovation in trade unions (Figure 3), the leadership and management have drawn upon strategic information from members, and this information has been used for strategic positioning, that is, decisions on service development. However, problems have been identified. The most important of these refers to responsiveness to member intelligence. This responsiveness has, on a formal level, been rather well developed, as the Barometer has been used for the formulation and assessment of objectives. However, the organization's capability to formulate and assess objectives at the strategic level has not been thoroughly developed. A lack of knowledge among managers and employees about the instrument has been identified. Organizational, cultural and political factors hindering an accurate utilization of the acquired information have also been traced.

7.3.2 The Design Dialogue Methodology

The organization has been capable of developing and organizing the utilization of the Design Dialogue Methodology. It has also, to some extent, been capable of utilizing the information acquired. The methodology has been very popular among participants and internal service developers. The diffusion of the methodology on a mouth-to-mouth basis has been rather successful. The Design Dialogue Methodology has, where used, contributed to enhanced levels of market orientation, as its contributions to service innovation have been evident, and contributions to strategic positioning have also been identified. Using the terms of the model for strategic positioning and service innovation in trade unions (Figure 3), service innovation decisions have been influenced by the listening to members. To conclude the utilization of Design Dialogue Methodology in terms of service innovation, the information acquisition (listening) has been assessed as being quite successful, while the responsiveness to information (learning), in terms of utilization and dissemination of results has been far more problematic. Results have only been diffused beyond the projects in which Design Dialogue processes have been organized to a very limited extent– and no strategies for the diffusion of information have existed. Hence, managers may have been informed of results when they are closely involved in the process concerned, but not informed of the quite widespread utilization of the methodology. The methodology as such and its properties have not been presented and marketed to the management system of the organization.

A specific problem concerning the utilization of Design Dialogue Process information has been that the results have been quite poorly used within the various projects. This has partially been due to the imperfect timing of the Design Dialogue Group sessions – sometimes they have been held too late in a particular development process. Another problematic factor has related to the project group's responsiveness to what is said by the Design Dialogue Group participants. Finally, the organization's ability to nurture the newly acquired creative and divergent ideas has been underdeveloped. As proposed in the design principles presented in next chapter, stronger commitment and methodological knowledge, combined with more developed processes for the documentation and elaboration of Design Dialogue Group results can all enhance the usability of the methodology.

7.4 Organizational factors enabling or hindering a better utilization of the methods studied

The final issue in this chapter is that of exploring trade union characteristics as factors possibly hindering or enabling the accurate utilization of market orientation methods for service innovation. The study thus concentrates on factors especially difficult to overcome in applying market orientation methods in a union setting and on factors which have facilitated their use.

Figure 4 describes a dynamic model for strategic positioning and service innovation in trade unions. According to the model, development of the service portfolio and the strategic position is dependent on managerial capabilities in four aspects:

- *Listening to business intelligence*: Management needs the capability to utilize business intelligence for adequate considerations of changed strategic positioning.
- *Listening to strategic information from members*: Management needs the capability to utilize information acquired from members (e.g. through the Barometer) and information on available service innovation alternatives for adequate considerations of changed strategic positioning.
- *Management decisions about service development*: Management needs the capability to communicate its intentions to those who are designing new service alternatives, so that the service innovation alternatives enforcing a desired strategic position are prioritized.
- *Management decisions about implementing new services*: Management needs the capability to impose the selection, development, and implementation of service innovation alternatives enforcing the desired strategic position.

The final three of these managerial capabilities are within the scope of this thesis and are thus discussed in this chapter.

7.4.1 Capability to utilize information acquired from members for strategic considerations

The management's capability to utilize information acquired from members for strategic considerations has been strengthened through the dissemination of Barometer results and through the presentation of these results in the central managerial bodies. The dissemination of Barometer results – they have been made available to all employees – and the utilization of Barometer-related objectives in the organization, have been enabling factors with the potential of "infusing" strategic intent throughout the organization.

An identified lack of methodological knowledge among managers and in the organization has been a factor hindering the ability to use Barometer information (Paper 4). As has been shown (Papers 4-6), a lack of methodological knowledge on the Design Dialogue Methodology has hampered proper utilization of the acquired results. Another problem related to the Design Dialogue Methodology is that results have rarely been diffused beyond the responsible project group. Hence, information on Design Dialogue results – or the methodology as such – has rarely been diffused.

7.4.2 Capability to control and influence the design processes

The next issue concerns the management's capability to control or influence the design processes in order to prioritize service innovation alternatives enforcing a desired strategic position. This connects to the organization's ambitions to meet its strategic challenges and to establish a "sense of urgency". The challenge for Sif is to develop and deliver services useful for its members, contributing to a strengthened strategic position for the organization. On an overall level, the importance of strategic renewal is strongly expressed in Sif, not least in its strategic documents, such as the Program of Ideas (Sif, 2000a) and the Action Program (Sif, 2000). This has been an important driving force behind the projects in which the Design Dialogue Methodology has been used. Such projects have been of strategic importance and have contributed knowledge and concepts derived directly from members (Papers 4-6). Both the ability to select fields of innovation of strategic importance and the involvement of members in innovation processes are important factors enabling the selection of appropriate new services.

As already described, the utilization of the methodology has contributed to a strengthened sense of the importance of developing services of interest for the members. The work procedures associated with the Design Dialogue Methodology connect to what has been described as task alignment; the development of the core human resource attributes coordination, commitment, and competence through changed behaviors in terms of work routines (Beer et al., 1990). The utilization of the Design Dialogue Methodology thus calls for new ways to coordinate, enhances commitment, and strengthens competence in terms of knowledge on members' ideas and situations. Not least the commitment created in the project groups utilizing the methodology has been important as a factor for further development of the methodology as such. Thus, task alignment is a viable strategy for learning and process development. To conclude, strong organizational commitment enables the utilization of the market orientation method, and the methodology (the Design Dialogue Methodology) may encompass inherent properties enforcing organizational commitment.

The development and utilization of the Design Dialogue Methodology has been connected to the action research project reported in this thesis. This has been an important enabling factor, as personal resources for coordination of methodology utilization and process learning have been at hand. Moreover, the action researcher role has been connected to political entrepreneurship in terms of applying the methodology on important issues, using internal colleagues, and utilizing the researcher's relational platform and internal credibility (see Paper 2).

The selection of adequate services to be developed has been problematic, due to an insufficient ability to execute management by objectives. This has resulted in difficulties in formulating and assessing such objectives, as stated by the CEO (Paper 3) and indicated as reported problems on the assessment and analysis of results on Barometer-related objectives. Thus, the inference drawn above in this chapter – that the Barometer has not contributed actionable knowledge at the operational level – could additionally be interpreted as a problem symptomatic of the organization's capability to formulate objectives.

Another hindering factor identified here is that of internal politics. This problem has resulted in decision-making inertia. The political behaviors identified in this study have been predominantly connected to the Sif Barometer (Paper 3), but organizational politics have also been evident when the Design Dialogue Methodology has been used in connection with negotiation processes. In the case of the Barometer, internal politics have hampered the utilization of market information. Two specific examples clearly illustrate the occurrence of organizational politics in connection with the Barometer (Paper 3). The first example concerns the tendency in the management team not to discuss Barometer results, as managers responsible for processes with satisfactory results tend to keep quiet as they may be afraid of losing budgetary resources to processes in need, while managers responsible for processes with poor results tend to keep quiet in order to avoid criticism. The second example is related to a reported evaluation of the utilization of the Barometer. This evaluation showed that many Barometer results have been assessed as critical by the members of the management team, but not considered in the planning process. Despite this, the management team showed no interest in a further discussion on the utilization of Barometer results.

Buchanan and Badham (1999) argue that the role of political behavior in organizational change processes has been scarcely discussed in the academic management literature. Contrasting the rational actor model, Dill and Pearson (1984: 139), argue that a model acknowledging organizational politics is useful, as it perceives "the pluralistic needs and values of organizational participants, sources of individual power, the importance of informal communications networks and the consequences of these factors for defining the necessary managerial skills". Thus, lobbying and maneuvering are essentially exercises in power mobilization, based on the structure and nature of direct and indirect interpersonal relationships (Pettigrew, 1973). The occurrence of politics in relation to market information is not unique to Sif, as it has been identified in other organizations (Piercy, 1995). Organizational politics can have both positive and negative implications in organizations. However, internal politics have disrupted the utilization of the Barometer.

7.4.3 Capability to select adequate services to implement

The third aspect of management relates to the management's capability, from existing design alternatives, to select adequate services to implement. In the case of the Barometer, this has been enabled by the managers' perception of the Barometer as an important planning and evaluation tool (Paper 3). In the case of the Design Dialogue Methodology, the strengthened commitment presented discussed above – and enhanced knowledge about member needs, ideas and attitudes – among internal service developers has potentially contributed to an augmented ability to select adequate services.

Factors hindering the selection of adequate service innovations include internal politics and the insufficient ability (see above) to execute management by objectives. Another, more specific, problem is that the Design Dialogue Methodology has sometimes been used too late in the innovation process (Papers 5 and 6).

7.5 Summary of the chapter

To conclude the chapter, Sif has gained from utilizing market orientation methods, but there is a need to utilize them better. This calls for development of the methods as such and for the development of managerial capabilities.

The findings in this study on the utilization of market information are not unique – problems arising from such utilization have been reported in the literature. Deshpande and Zaltman (1982; 1984; 1987) have discussed the importance of perceived credibility and usefulness of market information, while Menon and Varadarajan (1992) have identified organizational structure, technical quality, surprise, actionability, and researcher-manager interaction as variables affecting the managerial use of market information. Piercy (1995) found internal barriers that can hamper the proper use of customer satisfaction survey results. Among these were *internal politics* (that customer satisfaction measures become part of the "politicking" between departments and groups), *market simplification* (that people make assumptions about the market and customers that make customer satisfaction issues appear unimportant), and *corporate culture* (that evaluating and using customer satisfaction measurements is believed to be "inappropriate"). Other hindering factors were *market complacency* (that people believe they know what customers think and that they have the best product, which is what really matters), *resources/capability* (problems in getting resources and expertise), and *cost barriers* (that finance is not available). Finally, *credibility* (that the results are seen to be ignored) was identified as a key factor.

The more specific contribution from this study is its focus on the importance of knowledge. Issues concerning organizational knowledge and organizational politics will be discussed further in the following chapters.

8. Augmenting the impact of market orientation methods

This chapter aims to provide an answer to the research question concerning how the utilization of the market orientation methods studied can be developed in order to better contribute to strategic positioning and service innovation in the organization studied. These answers are presented in the form of proposed design principles. In the following section, the conditions required for positive contributions to strategic positioning and service innovation from market orientation methods will be suggested and discussed. The final section concerns opportunities to enhance the usefulness of market information through the utilization of service innovation techniques for strategic positioning.

In Chapter 4 a dynamic model for strategic positioning and service innovation was developed (Figure 3). Chapter 7 presented results concerning the impact of the Barometer and the Design Dialogue Methodology on market orientation in the union. The utilization of market orientation methods was thus described in terms of contributions to the fulfillment of two purposes: strategic positioning and service innovation. Hence, strengths and weaknesses in the functioning of the dynamic model (Figure 3) were described, and summarized in Tables 7-10. My theory implies that if the observed weaknesses could be overcome, this would increase the organization's ability to become market oriented. From the basis of my research and literature in this research field, this chapter aims to arrive at propositions for augmented utilization and impact of the market orientation methods under study. Thus, the chapter provides an answer to my third research question:

- How can market orientation methods and their use be developed to better contribute to strategic positioning and service innovation in trade unions?

The chapter presents design principles that aim to enhance the impact of the methods utilized. These design principles are developed in the appended papers (3, 5-6). The Barometer section ends with a set of specific conclusions concerning an enhanced utilization for strategic positioning, while the Design Dialogue Methodology section concludes with conclusions on enhanced utilization for service innovation. The issue of utilizing the Design Dialogue Methodology for strategic positioning will be dealt with at the end of the chapter.

8.1 Improving the utilization of the Barometer

The utilization of the Barometer was the specific object of the study presented in Paper 3. The background to the study was that experiences from internal market researchers and earlier studies had indicated that uncomfortable results from the Barometer seem to have been more or less neglected by managers. The more specific research aim of Paper 3 was to examine how the utilization of market

information could be enhanced through activities aimed at enhancing its perceived credibility and usefulness.
The Barometer contributions to strategic positioning have been problematic in some respects (Table 7). Thus, better contributions to strategic positioning should address the following challenges:

- Preventing the leadership from neglecting important information
- Producing information on member satisfaction that is perceived to be actionable
- Producing information on levels of satisfaction with activities among specific member segments

The further analysis of the Barometer is restricted to strategic positioning. Hence, the problems of acquiring actionable knowledge at the activity or operational level will not be dealt with here.

As stated above (Chapter 4.1; Narver and Slater, 1990), competitor orientation is perceived as an important dimension of market orientation. However, as this aspect has not been intended to be covered by the Barometer, this specific problem will not be dealt with further in this chapter. A competitor orientation for a trade union can consist of, for example, scanning of competitors' strategic intent and service offerings, regular comparisons of membership recruitment figures, and, when available, comparisons of member satisfaction figures. Moreover, customer satisfaction indices from other organizations providing services can be of interest. Sif has used methods other than the Barometer to collect competitor information, but these methods have not been studied.

8.1.1 Preventing the leadership from neglecting important information

In Chapter 7 (and in Paper 3) it was shown that important Barometer information has been neglected by the leadership. Thus, it is important to trace the factors behind this neglect of information, and to suggest actions in order to enhance the leadership's capability to act on information.

The Barometer initially had the purpose of being a strategic tool, aimed at contributing to the evaluation of goals in the Action Program. The properties of the Barometer were quite well related to strategic issues. Therefore, it could be perceived as surprising that it had not been better utilized for strategic decision-making. However, this is a frequently reported weakness when surveys are used, and needs to be overcome if such tools are to be useful for strategic positioning. My analysis has shown that if the management of the union wants the survey to be utilized, the survey needs to be perceived as meaningful, goal relevant and operationally valid. It is not enough to conduct a state-of-the-art survey to glean market information; the results must also be accepted and relied upon in the organization. Important factors then concern the internal researcher competency, trustful researcher-manager interactions, and the knowledge level among managers about the survey and analysis methodologies. Moreover, a commitment to the utilization of survey results from senior management is an important factor. A specific problem is that the reliability of Barometer results has been overtly questioned during management conferences, and the senior management (or internal researchers) have not had the ability to respond to such criticism.

A problem identified concerned insufficient methodological knowledge among the Barometer users. This was identified through interviews, which clearly indicated that managers and process owners did not know how to use the information provided or what kind of additional information they could obtain. One specific result of this insufficient methodological knowledge is shown as the blurred objectives of the Barometer. The insufficient level of knowledge may also have been a factor behind the lack of belief in Barometer results expressed by some managers.

The study indicated that the knowledge about the Barometer and the level of interest in its results were higher during an earlier phase, when a number of survey questions were formulated by the regional managers. In order to achieve high internal interest in the study results, managers and employees should participate in this process, even though their contributions may not be important for creating high technical quality in studies concerning strategic issues. To contribute evaluations at the operational level, the internal participation from managers and employees in the study design process is critical, both for the quality of the study produced, and for the level of interest in its utilization.

The utilization of membership voice in the creation of the questionnaire and rigorous data collection and analyses have been important prerequisites for high technical quality in terms of reliability and validity (Johnson and Gustafsson, 2000). Such member participation also contributes to the legitimacy of the survey and its results. Member participation in study design is equally important when service performance is to be measured as when the study targets strategic issues.

Identification of and reflection on these behaviors may provide important contributions to organizational learning and change, and thus contribute to future decision-making and improved value and use of market information. The problem that important information has been neglected by the leadership is to some extent related to the lack of knowledge discussed above. Other factors are related to a perceived lack of opportunities to change prioritizations, and organizational politics – identified as silence when Barometer results are discussed. During this study an array of managerial behaviors, when confronted with Barometer results, were observed. These were termed pro-actions, aligned actions, re-interpretations, passivity, politics, and denials (Paper 3). Thus, the actionability of survey results have depended not only on the results as such, but also on the organization's aptitude to change. The acquisition of survey results that are not intended to be used seems to be rather meaningless. Clearly stated aims for studies and the identification of inadequate political behaviors could lessen the magnitude of this problem. More specifically, there seems to be a need

for the management team to enhance its ability to process and respond to uncomfortable information.
To conclude, the neglect of important Barometer information by the management is a problem with many dimensions. The proposed design principles, developed from the theoretical considerations and the findings reported here are thus covering a relatively wide area.

The proposed design principles are as follows:

- The aims of the study should be clearly stated and the study design must be closely related to these aims.
- The technical quality of the survey must be undisputed. This calls not only for a high quality survey, but also for:
  - high internal researcher competency
  - trustful researcher-manager interactions
  - sufficient knowledge among managers about the survey and analysis methodologies.
- Senior management should actively utilize and express their trust in survey results.
- As utilization of market information requires methodological knowledge among managers and employees, knowledge gaps should be identified and responded to.
- Managers and employees should be involved and participate during the survey instrument creation in order to increase their knowledge and interest.
- Users should be involved in the survey design in order to develop measures relevant for their perceptions of the organization.
- As organizations enhance their use of customer satisfaction surveys through internal evaluations and reflections, inadequate political behaviors can and should be responded to.

8.1.2 Producing information on member satisfaction that is perceived to be actionable

The perceived lack of actionability of the Barometer results is a causal factor of the limited utilization of Barometer results described above. Thus, the proposed design principles are equally relevant for the creation of information perceived to be actionable. Not least the proposed design principle on clarity concerning aims of the study and the principles on knowledge and internal politics are of importance.

8.1.3 Producing information on levels of satisfaction with activities among specific member segments

As described in Chapter 7, a wide range of selectable background variables have enabled management and Sif staff to glean information from the Barometer on specific member groups. This has been used for regional comparisons and in order to assess the specific focus on members in the IT sector. However, the opportunities to evaluate satisfaction levels among specific member groups have otherwise not been reported as having been important. For example, due to a lack of methodological knowledge, overall satisfaction levels among members who had utilized career services had not been processed. Furthermore, it can be considered as a shortcoming that the same approximately 110 items have been used as questions for all members. For example, some of the questions put to managers could have been tailored in order to obtain specific information from that segment. A lack of methodological knowledge is, again, the most important factor explaining the relatively poor utilization of the Barometer to follow up specific segments. This insight is accordingly incorporated in the design principles proposed above.

8.2 Improving the utilization of the Design Dialogue Methodology

The presentation and evaluation made in Chapter 6 indicated that the methodology had been relatively successful in terms of newly acquired concepts and knowledge. However, three specific problems or challenges have been identified and will be further discussed:

- Organizing user involvement to obtain high levels of creativity in group settings (See Paper 5).
- Organizing learning from users: Improvements of the utilization of new concepts and knowledge (See also Paper 6).
- Improving the dissemination of results outside the project groups involved.

The study of the Design Dialogue Methodology has resulted in three papers (4-6), of which Paper 5 concerns group creativity and Paper 6 focuses on learning from Design Dialogue Group sessions. Findings presented in the papers that relate to opportunities to improve the utilization of the methodology will be briefly discussed below. This is then followed by a presentation of proposed design principles for improving the utilization of the Design Dialogue Methodology.

8.2.1 Organizing user involvement to obtain high levels of creativity in group settings

It is evident that members participating in Design Dialogue Groups have contributed important and useful information to the organization.

The initial study (Paper 4) evaluated the knowledge acquired from the members. The overall impression was that the majority of the service ideas generated concerned traditional services and activities. Another finding was that the service ideas were not the only results from the work with the design dialogue platform. The discussions in the groups contributed "encultured knowledge" (Blackler, 1995) as an important element of organizational learning.

The importance and benefits of listening to members in Design Dialogue Group sessions have been clearly expressed by internal moderators and project group members (see below and Paper 6). It was also evident that participants in Design Dialogue Group sessions have evaluated the sessions and their own contributions very positively. The participants evaluated 12 Design Dialogue Group sessions related to the development of a virtual community platform. These evaluations concerned opportunities to make oneself heard in the group, group involvement in the task, group creativity, individual involvement in the task, individual creativity, the quality of the exchange of ideas and experiences, whether it was worth the time to participate, and whether the group contributed important ideas to Sif. The individual assessments of the sessions were strongly positive – even in relation to individual and group creativity. However, the perception in the organization was that members only to some extent contributed new and original ideas.

One study (Paper 5) delved into the issue of enhancing group creativity. In short, the aims of this study were twofold: 1) to relate prior research contributions to Design Dialogue Group experiences and thereby augment our understanding on factors enhancing and threatening creativity in Design Dialogue Group settings and 2) to systematize these findings into a set of proposed design principles. The starting point was that experiences from numerous Design Dialogue Group settings have indicated that group results were to some extent evaluated as being creative, group participants evaluated their contributions as being creative, and the design dialogue platform has subsequently been extensively used in the organization, but that the creative outcome could be significantly enhanced. The major assumption behind the study was that many factors behind group creativity can be controlled. Thus, a careful design of the group creativity process would increase the likelihood of success since measures to enhance creative behaviors and to avoid pitfalls could be planned and/or taken by a group moderator.

Experiences from Design Dialogue Group sessions have indicated the importance of design features such as careful recruitment of participants, preparation of the moderator, and design of work procedures. Shortcomings have related to recruitment errors, insufficiently prepared moderators or poorly designed work procedures that have resulted in less successful group performances.

The aim of the paper was not to propose a comprehensive list of design principles. Many more principles could be formulated and the proposed design principles may be further developed and refined. When presented below, the design principles have been slightly altered from those presented in Paper 5. Through additional research and testing of the principles, their scope and limitations can be explored and expressed further. As presented above, these principles emanate from empirical observations and theoretical considerations. The design principles target three areas (Amabile, 1996): 1) domain-relevant skills, 2) creativity-related processes, and 3) task motivation.

Proposed design principles:

- Participants with domain-relevant skills can be selected through their own pre-assessment of their own domain-relevant skills, if they are given sufficient group and task information.

- In order to produce ideas of high originality, participants with high levels of domain-relevant skills (experts) should be avoided. On the other hand, experts may be suitable participants if it is more important to generate ideas which are easier to use in the development of new activities, services and products.
- Internally recruited moderators should be engaged, in preference to external consultants, as they are more familiar with the domain and are perceived by the participants as being familiar with and engaged in the task.
- The utilization of internal moderators, who are experts at the task, may have an advantage in the interaction with participants and in terms of focusing discussions on important issues.
- The mixture of individual assignments and group exercises enhances participants' involvement and results in a broader description of experiences as well as in more ideas than if individual assignments are not used.
- Evaluation apprehension should be avoided through given guarantees that the results will not be traced to individuals or to specific groups.
- In order to obtain high group productivity, tasks should be divided into specific sub-tasks which are dealt with under strict time limits and result-presentation rules should be clearly stated.
- The moderator's ability to engage all participants should be emphasized.
- Voluntary participation enhances task motivation.
- In order to provide a group climate characterized by trust and security, participants should preferably have no prior relations with each other.

8.2.2 Organizing learning from users: Improvements of the utilization of new concepts and knowledge

Paper 6 examines the learning in projects where the Design Dialogue Methodology has been used. The study resulted in a number of design principles concerning the organization's ability to acquire and develop information from members. The proposed design principles, targeting the organization's core human capabilities in terms of coordination, commitment, and competence, cover activities related to preparation, documentation, and concept elaboration. The study followed three cases: preparations for two national negotiating rounds (one in the IT sector and one in all industrial sectors) and the development of a virtual community platform for members. In the study, Sif employees organizing the Design Dialogue Group sessions were described as the task force and those leading the sessions had a role as moderators.

The individual learning of the moderators and project participants from the organization was considerable. Without exception, moderators reported that the Design Dialogue Groups had contributed to their understanding of individual members' situations and the diversity of members. The Design Dialogue Groups provided important knowledge on the members' situation. Interaction with members in Design Dialogue Group settings also contributed to increased commitment in the task force.

Even though many moderators felt that Design Dialogue Group sessions confirmed their knowledge about members, they saw it as important to listen to the words used by members, as they differed from the established trade union terminology. The contacts with members in Design Dialogue Group settings were considered to be deeper and more reflective than many other member contacts. This contributed to an enhanced understanding of the daily lives of the members. In the words of one Sif employee:

> *(We learn about) typically basic needs, which we tend to overlook in our daily work, because they are so difficult to satisfy.....We need to adapt to different member groups. Otherwise it doesn't matter how much information you send them. .. I think I have got used to something I always have known, but have had problems internalizing the fact that the members do not define their problems as we do. (Negotiator)*

The methodology also created learning concerning individual abilities to listen and organize creative meetings based on active participation.

The findings were more complex on learning at the project group/task force level. Some new ideas were collected through the Design Dialogue Groups, but more often the group sessions confirmed that the organization was on the right track. Concepts and experiences had, to some extent, been translated into action. A problem was that less developed concepts tended to be lost, as they may not have been identified, elaborated, or evaluated.

The design principles presented below have been slightly altered from those set out in the paper. In order to address settings other than the Design Dialogue Groups, the design propositions concern user groups (which should be defined as groups of users, gathered by the organization in settings similar to group interviews, focus groups, or the Design Dialogue Groups). The design principles derived from the study specifically address the role played by the internal project group/task force. Paper 6 concentrates on project group learning from user groups (such as Design Dialogue Groups) and thus provides design principles from a rather restricted perspective.

Proposed design principles:

- Levels of commitment will increase, when preparations are coordinated in order to achieve the task force's and moderator's involvement in the entire process.
- User group sessions must be carefully coordinated in order to contribute concepts and knowledge at the correct phase of the development process.
- The task force members – and foremost the moderator – must be familiar with the methodology.
- The task force members should be assigned with specifically documented tasks while following user group sessions.
- Process results in terms of newly acquired concepts and knowledge are enhanced if specific concept elaboration sessions are held with the task force.

- The design and utilization of specific concept evaluations should be decided by the task force.

8.2.3 Improving the dissemination of results outside the project groups involved

The dissemination of results in the organization has been problematic. During an internal evaluative seminar, the participants noticed that many of the Design Dialogue Group results could be useful in other areas in the organization. It was thus pointed out as being important to develop further the union's internal working procedures.

The collective learning processes and outcomes associated with the methodology as such had not been explicitly coordinated. Instead, the methodology had been spread through word-of-mouth, and this diffusion was evaluated as being successful.

From the experiences in the organization an additional design principle, covering the nurturing and dissemination of results, is proposed. It is primarily built upon the experience that the generation and dissemination of ideas and results do not necessarily take place spontaneously.

Proposed design principle:

- Specific measures need to be taken (and planned for) in order to ensure that user group results – creative and divergent ideas – are generated and disseminated in the organization.

8.3 Additional utilization of the Design Dialogue Methodology: a tool for strategic positioning

The Design Dialogue Methodology is predominantly perceived as a tool for the production of ideas for service innovations. However, Design Dialogue Group results have also been used as an instrument for positioning the organization vis-à-vis managers and for positioning the organization in negotiating processes. The utilization of the Design Dialogue Methodology for positioning Sif as an organization for managers (Paper 3) is interesting, as it was one of the methods used when a strategy document was produced. The evaluation of the ideas derived from the groups of managers showed that many ideas had strategic properties. The most important example relates to the finding that managers are interested in more dialogue among themselves (Huff, 2003). An Internet based platform for virtual communities was thereafter developed – and managers were among the groups selected to participate in Design Dialogue Groups utilized in the development process. Instruments predominantly used for the development of service innovation knowledge have thus proved to generate results of potential importance for strategic positioning. In the case of the Design Dialogue Methodology, the opportunities to generate information useful for strategic positioning may be enhanced considerably through a development of the work procedures in the project groups involved.

As proposed in of the one design principles above, the internal elaboration of the acquired information – in project groups or other configurations – is a core element of this utilization of qualitative information for strategic positioning. Thus, as to the utilization of techniques developed for service innovation for decisions on strategic alternatives, the properties of the acquired information may have a hindering effect. However, the utilization of the internal knowledge system for elaboration on these data may enable the creation of new strategic alternatives.

9. Does the union have the capability to better utilize the market orientation methods?

This chapter initially describes action strategies hindering and enabling double-loop learning. This is followed by a discussion on the learning orientation of Sif. The chapter concludes with a discussion on change strategies enabling double-loop learning.

A market oriented organization needs to acquire, analyze, and utilize information on how its service offer is perceived by users and potential users, and how the services offered are used and evaluated by users. Moreover, the organization needs external impulses for the renewal and development of its existing services. In this thesis the studies of a membership satisfaction survey (the Barometer), predominantly contributing to strategic positioning, and the Design Dialogue Methodology, predominantly aimed at service innovation, have indicated that market orientation methods can be used in a trade union setting. Moreover, a number of design principles for the enhanced value of market orientation methods have been proposed.

Figure 4 sets out a framework for strategic positioning, service innovation and development of market orientation in trade unions. The learning and process development cycle in the model depicts learning through reflection on processes in use, and through planning, testing, and evaluating new learning techniques and models. This could consist of single-loop as well as double-loop learning. Such learning has often resulted in corrections of the utilization of the methods without any real questioning of the variables governing their utilization. An example of single-loop learning can be that, if an objective is not reached, the objective is slightly altered, so that it can be more easily reached. Single-loop learning can, for example, result in the non-publication of uncomfortable results. The basic organizational assumptions are thus not interrogated or altered.

Double-loop learning, on the other hand, changes the governing variables themselves. This can, for example, take the form of an open discussion on the means for reaching organizational objectives. Double-loop problems are difficult to handle due to their connections with the defenses of human beings (Argyris et al., 1985: 86).

What is single-loop learning and what is double-loop learning is to some extent a matter of perspective. Learning that is double-loop with respect to particular actions can thus from a strategic perspective be considered as single-loop learning (Argyris et al., 1985: 86).

The learning loop depicted in Figure 4 can be described as consisting of two distinctive learning loops. The first concerns learning to utilize the chosen market orientation methods in a better way. This is, seen from a strategic perspective, mostly single-loop learning, and has been discussed in Chapters 7 and 8.

The second learning loop concerns learning to question the taken-for-granted assumptions prevalent in the organization – this is double-loop learning. This process can result in strategic re-positioning and in a reconfiguration of the service portfolio.

The issue in this chapter is that of exploring the existing double-loop learning in the organization and to propose strategies for the creation of organizational susceptibility to double-loop learning.

9.1 Action strategies hindering and enabling double-loop learning

Argyris and Schön (1974), in developing the concepts of single- and double-loop learning, have also discussed action routines (theories-in-use) connected with the two different ways of learning. Model I theories-in-use inhibit double-loop learning, while Model II theories-in-use enable double-loop learning. The specific features of the two models are briefly introduced below.

It is important to note that most organizations show an action routine mixture incorporating elements of both learning models. The next issue is to explore the occurrence of Model I and Model II theories-in-use in Sif. The categorizations discussed below are based on Argyris and Schön (1974).

Model I theories-in-use are built upon governing variables such as *goal definition and achievement*, *maximizing winning and minimizing losing*, *minimizing the generation or expression of negative feelings*, and *being rational*. To satisfy such governing variables, action strategies include unilateral design and management of the environment, ownership and control of the task and unilateral self-protection and protection of others. These protective behaviors include, for example, blindness on the incongruity between rhetoric and behavior and defensive action such as blaming, stereotyping, suppressing feelings, intellectualization, and withholding information. The consequences of such action strategies are, among other things, a perception of actors as defensive and inconsistent, defensive group relationships, and defensive norms. This results in single-loop learning and decreased effectiveness.

Model II theories-in-use are built upon governing variables such as *valid information*, *free and informed choice*, and *internal commitment to the choice and constant monitoring of its implementation*. To satisfy such governing variables, action strategies include the design of situations or environments where participants can experience personal psychological success and confirmation. Action strategies, moreover, aim at securing joint task control, protection of the self in joint enterprises oriented towards growth, and the bilateral protection of others. The consequences of such action strategies are, among other things, that actors are experienced as minimally defensive (facilitators, collaborators, choice creators), that interpersonal relations and dynamics are minimally defensive, and that learning-oriented norms (trust, individuality, open confrontation of difficult issues) develop. This results in double-loop learning and increased long-term effectiveness.

9.2 The learning orientation of Sif

The management's treatment of Barometer information has been described in Chapter 7. Not least poor methodological knowledge and internal politics were described as factors hindering proper utilization of the acquired information. The existence of action routines of a Model I character has been obvious in the management team. For example, the members of the management team have been reluctant to discuss their respective tasks – being silent on both positive and negative results thereby indicating a defensive interpersonal and group relationship, a sense of vulnerability and offering little help to others. Blaming external factors for not reaching goals, a tendency to intellectualize, and avoidance of open rivalry through diplomacy when poor results are achieved are other identifiable behaviors.

These identified behaviors are especially problematic since no explicit behaviors of the Model II type have been traced. For example, limited knowledge has not been responded to by an interest in learning, and poor actions on Barometer results have been insufficiently interesting to be discussed in the management team.

The situation has been different in respect of the Design Dialogue Groups. The sole decision to utilize the methodology is a result of double-loop learning in each specific situation. The perception that the organization should involve its members in service innovation processes is, as such, challenging old norms and habits. Moreover, the idea that this interaction with members can be an internal task, organized without any help from consultants, is another result of double-loop learning. The project groups involved in the utilization of the methodology have met work procedures based on learning-oriented norms, and this learning orientation has been aligned with learning from participants in the group sessions as well as with the development of the methodology as such. This learning orientation has been an increasingly important feature of the Design Dialogue methodology.

On the other hand, the Design Dialogue methodology has contributed to, and been a part of, Model II action routines, but only in the micro-climate created by the project groups involved. Moreover, the project groups have been involved in Model II learning, but the actions resulting from this learning have to some extent leant on Model I action routines. Hence, many ideas obtained from Design Groups have been appreciated by the project groups, but, despite this, not translated into the development of new services.

Argyris et al. (1985: 88) have found that organizations are generally competent at single-loop learning, but not at double-loop learning. In the case of Sif, it seems like the organization is dominated by defensive Model I routines. However, the Design Dialogue methodology has shown that Model II action routines, at least to some extent, have developed at the micro-level.

9.3 Making the framework work: Strategies enabling double-loop learning on strategic positioning and service innovation

As described, there are strong arguments for enhancing the double-loop learning processes in the organization – implementing Model II theories-in-use. From theoretical considerations and experiences gained during the research process, some propositions with such purpose can now be formulated:

- *Knowledge enhances learning*: the utilization of market information requires knowledge among managers and employees about the instruments used to ensure accurate interpretations and utilization of the results acquired. Individuals need to understand the instruments to understand their contributions. Knowledge thus has a role in breaking down the barriers that obstruct a more accurate utilization of market information. Such methodological knowledge can be enhanced in many different ways. Offering seminars and specific courses to managers and staff, as well as recruitment of employees with sufficient knowledge, are possible strategies. The experience from the implementation of the Barometer, as well as experiences from the development process of the Design Dialogue Methodology, is that employee and/or management participation in developmental stages may be used for leveraging the level of interest and knowledge about the methodology used. Activities for knowledge development on the market orientation instruments should thus be built upon such participation in the initial phases of the creation of market orientation tools. Such learning efforts can result in lower levels of defensive action, as the design of the process for creating valid information is then a joint activity (Argyris and Schön, 1978).

- *Task alignment is a viable strategy for the creation of learning micro-climates*: Argyris and Schön (1978) argue that learning does not really occur in an organization unless change takes place. Learning through the change of work behaviors is the core element of a task alignment strategy. Beer et al. (1990) propose *task alignment* as a change strategy, based on the assumption that the core human resource attributes *coordination*, *commitment*, and *competence* are best developed through changed behaviors in terms of work routines. Task alignment is a strategy targeting learning capabilities in the organization that is not only an approach for solving problems in the long term, but also an immediate response to tangible business problems. The utilization and diffusion of the Design Dialogue Methodology bears resemblance to a task alignment strategy, as the development of the methodology has been based on and further developed *coordination*, *commitment*, and *competence* in the organization. The development of the methodology is an example of learning through change. It is also a process of *experiential learning* (see 4.4.4), as described by Kolb (1984).

- *Action research may contribute to double-loop learning*: Argyris et al. (1985: 98) describe that the role of the action scientist is to help members of client systems reflect on the world and learn to change – the action scientist intends to produce action consistent with Model II. Experiential learning is a basis for *action research.* The development and utilization of the Design Dialogue Methodology has been connected to the action research project reported in this thesis. The action research method has inherent change properties connected to its "learning by change" approach. Moreover, the formation of a research project makes it more likely that personal resources for coordination of methodology utilization and process learning are at hand.

- *Actors should consider the discrepancies between espoused theories and theories-in-use:* In the Sif case, various political behaviors hampering double-loop learning have been traced. Senior management has a specific responsibility to scrutinize both its own behaviors and organizational practices. Such processes can be easier to implement if the technical quality of the survey is undisputed, if the level of competency among internal researchers is high and if managers have a sufficient knowledge about the market orientation methodologies utilized (See Chapter 8). A broad level of participation and involvement of managers and employees during the development or adaptation of the market orientation instrument are other factors which can enable open and trustful discussions in order to enhance double-loop learning in the organization.

10. Market orientation: benefits and opportunities for trade unions

This chapter discusses the applicability of the study results to trade unions other than Sif and considers specifically whether differences exist between trade unions and other organizations in terms of the utilization of market orientation methods.

In the chapter, the following research question will be considered:

- What general inferences can be drawn on the design and application of market orientation methods that are useful in trade unions?

The chosen approach – undertaking in-depth studies in one specific organization – has provided opportunities to create and develop rich empirical material. Insider action research is aligned with the objectives of joint understanding, joint change activities, and joint reflection. Moreover, as described in the Method chapter, this approach may contribute to a high level of validity when results are related to the setting studied.

As discussed in Chapter 3, the Sif Barometer can be perceived as a typical quantitative market orientation method, while the Design Dialogue Methodology is an example of a qualitative market orientation method. The methods studied were chosen because of their specific importance in the setting studied. However, arising from my experience as an insider, I have little reason to doubt that the overall results obtained are consistent with any results I would have reached had I chosen other objects of study in the Sif setting. In this chapter, the discussion presented earlier and the findings on the two specific methods can thus be extended to apply to quantitative and qualitative market orientation methods in general.

The research approach used is not particularly helpful for assessing the generalizability of the results or recommendations. A careful conclusion should thus be to consider the results and recommendations as the basis for hypotheses to be further tested in the setting and in other trade unions. However, whilst arguing for further testing of these hypotheses, I nevertheless contend that the results and findings can be useful in other settings.

The research question presented above will be answered through an initial discussion on the usefulness of market orientation methods for trade unions, followed by a discussion of whether the trade union setting requires any specific properties for the market orientation methods to be utilized.

10.1 Are market orientation methods useful for trade unions?

An initial prerequisite for the usefulness of market orientation methods is that the organization recognizes itself as a market actor, meaning that the organization perceives that it plays a role in a market where it is important to provide an attractive membership offering in order to recruit and retain members. Such a member market is signified by the existence of unorganized workers and of members leaving one union for another or being unorganized. Organizations in a *de facto* monopoly situation or with little interest in high member market shares do not gain from utilizing market orientation methods. However, for trade unions identifying themselves as market actors, there are specific reasons to utilize market orientation methods. An argument for the utilization of market orientation methods in trade unions is that membership figures and union densities are performance measures to hand for trade unions (Fiorito et al., 1995) but additional information on the attractiveness of the membership package, on organizational effectiveness (to provide what is demanded) and to some extent on cost efficiency, may be hard to obtain without the utilization of market research techniques (see Chapter 3).

The organization studied, Sif, is evidently acting in a member market. Market orientation methods have proved to be useful in Sif (Chapter 7), even though this utilization could have been more efficient and effective. The question is thus whether these findings apply to other trade unions.

Despite organizing only white-collar employees, Sif is a large union, having enjoyed increasing membership figures for many years. Sif organizes about 50% of employees in its serviceable job territory, and boasts a strong financial status. Moreover, Sif is more overtly inclined towards its members' individual needs than many other unions – not least due to the heterogeneity of its members. The utilization of market orientation methods may thus be more widespread in Sif than in most other unions. Hence, it is not unlikely that the widespread utilization of market orientation methods have contributed to Sif's capability to attract members and thus to the organization's strength. Without arguing that Sif is a best practice case concerning market orientation of trade unions, I would at least consider Sif as a strong and successful user of such methods.

However, in other respects, Sif shares the main characteristics of most trade unions – not least its governance principles. The formal governance structure is more complex in trade unions than in many other organizations. A high proportion of the input from users/members is provided through members' participation in organizational activities and representation in decision-making bodies. Researchers have argued that trade union governance systems are characterized by an inherent potential conflict. Willman et al. (1993) have drawn attention to the tensions between union administrative and representative systems and the fact that control in unions is bi-directional from leaders to members (through formal control systems), and from members to leaders (through democratic structures) (Child et al., 1973; Undy et al., 1996).

The utilization of market information can reasonably be perceived as threatening the representative system of decision-making. This aspect may be important in many trade union settings. A forthcoming study will describe further the development, introduction, and utilization of the Barometer in this respect.

Some unions may still rely wholeheartedly on their representative systems – and in such cases the utilization of market orientation methods is by definition out of the question. However, many larger trade unions do use market orientation methods – and the analysis in this thesis gives no grounds to suggest that market orientation methods should be discarded by trade unions. This study has shown that the utilization of market orientation methods has the capacity to strengthen the administrative system without interfering with or being hindered by the representative system. Hence, it cannot be generally presumed that the inherent conflict between these systems questions the usefulness of market orientation in trade unions.

Market orientation methods can be less useful for trade unions with aggressive strategies towards employers. For example, trade unions successfully taking industrial action for reaching collective agreements may win members from such practices (Dølvik and Waddington, 2004: 23). Such activities can then, when successfully implemented, contribute arguments for attracting higher levels of union membership based on union strength towards the employer rather than from the provision of individual services.

Market orientation methods can also be less useful for trade unions with very close relations to external organizations, such as political parties or religious movements – as these external organizations may set the trade union agendas. Close liaisons between unions and governments – as used to be common in Eastern Europe – can also result in a weaker interest in listening to union members. Currently, social pacts at national level have been established in many European countries (Dølvik and Waddington, 2004: 28). However, these are not of such a character that they should have any impact on the perceived usefulness of market orientation methods in the participating unions.

To conclude, some trade unions do not act in a market or may otherwise hold characteristics making the utilization of market orientation methods difficult or meaningless. However, general union governance characteristics do not by nature interfere with the utilization of market orientation methods. Many unions can therefore use market orientation methods successfully.

10.2 Does the trade union setting require any specific properties for the market orientation methods to be utilized?

An analysis of the chapters above does not show that any of the proposed design principles or proposed efforts for enhancing the utilization of the market orientation methods should be considered to be of a character specific to Sif. I believe it reasonable to assume that they are useful for unions inclined towards using market information. The contributions from Chapter 8 could also be useful for organizations other than trade unions. However, the propositions concerning member and staff involvement in developmental activities is especially important in the trade union context.

The findings related to market orientation methods presented in this thesis are not of such a character that they can be deemed to be specific for trade unions. As a general rule, I therefore claim that market orientation methods need no trade union-specific adaptation to be utilized. However, as in every organization, the utilization of market orientation benefits from an adaptation to specific organizational cultures.

10.3 Is it harder to apply market orientation methods in unions other than Sif?

In this chapter, I have argued that market orientation methods can be useful in other unions than Sif. I have also suggested that they may face the same hindering and enabling factors which have been traced in Sif and that they may find the proposed design principles useful. This final section will be used to conclude and elaborate further on these arguments.

Sif has been described above as a strong organization in terms of membership figures and financial status and with a close member orientation inherent in its organizational culture. The heterogeneity among its members has long made it obvious that different member groups have different needs in respect of union services (Huzzard and Östergren, 2002). Accordingly, many prerogatives for the successful utilization of market orientation methods have been at hand. This study has shown that it cannot be generally presumed that a strong inherent conflict between the representative and the administrative systems makes market orientation methods of questionable usefulness in trade unions. Market orientation methods can thus be useful for unions, given that certain specific prerequisites are at hand.

My conclusion is that three specific factors are important for the successful utilization of market orientation methods in trade unions:

1. *Organizational culture*: There must be an acceptance of listening directly to members and potential members. Unions relying entirely on elected representatives and/or professional staff have no use for market orientation methods and are not likely to utilize them. Moreover, the perception that

members have individual needs and that the trade union has a role in relation to such individual needs is a necessary prerequisite for a viable utilization of market orientation methods.

2. *Member market position*: A strong member market position for a union can be described as occurring when it has a high "market share" in its target segments. Such a position augments its opportunities to successfully utilize market orientation methods. Externally, the strong position indicates organizational legitimacy and credibility in the target segments, making the acquisition of market information more efficient. Internally, the strong position in the target segment enhances the opportunities for accepting the market orientation efforts, as they largely target existing members. Financially, it is often less resource demanding to conduct market research when a rather high proportion of the segment (those who are members) is easily accessible. When a new market emerges (i.e. the growth of an industrial sector), it often takes time and requires resources to create a strong market share. This demands a sustainable strategy and a strong leadership for a long time period. One way of meeting such challenges can be to focus on well-defined smaller, but emerging, segments, instead of seeking to obtain the desired number of members through widening the scope of organizational recruitment. Accordingly, mergers with other unions may result in a less consistent strategic focus.

3. *Financial status*: Developing and utilizing market orientation methods in trade unions is resource consuming, not least as it requires major efforts in respect of organizational learning. Thus, financially weak unions with a low "market share" will face difficulties in becoming market oriented. In such situations, unions will need to be steadfast in their efforts to create the resources needed. One way to do this is to use strategic service innovations as a means for creating new, attractive member services – sometimes in collaboration with other actors – to strengthen the union's strategic position. An alternative for some unions is to seek mergers with other unions in order to attain jointly the critical mass needed.

To conclude, market orientation methods can contribute to trade union renewal, characterized by a stronger focus on the individual. Political and organizational considerations will result in a rejection of market orientation methods by some unions, while other unions will tread the path of market orientation. The prospects of successful renewal will, however, ultimately depend on many divergent factors.

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Appendix 1. A summary in Swedish

Att lära från medlemmar. Verktyg för tjänsteutveckling och strategisk förändring i fackliga organisationer

Inledning och beskrivning av den studerade organisationen

Fackliga organisationer i de västliga ekonomierna står inför en enorm utmaning. Åldrande befolkningar kommer att resultera i minskande medlemstal. De som lämnar arbetsmarknaden kommer att ersättas av färre – men bättre utbildade – nykomlingar. Det är en överlevnadsfråga för fackliga organisationer att kunna attrahera dessa unga, välutbildade personer. Fackliga strategier måste därför anpassas efter intressen och behov hos dessa presumtiva medlemmar.

Denna avhandling tar sin utgångspunkt i den förändrade värld som dagens fackliga organisationer upplever och verkar i. Redan har ökad individualisering i samhället, välståndsökningar och arbetsgivarstrategier inneburit att fackliga organisationer i västvärlden har förlorat medlemmar och fått minskat inflytande. Organisationerna försöker utveckla strategier för att möta nya behov hos enskilda medlemmar och medlemsgrupper. En lägre organisationsgrad har inneburit att presumtiva medlemmar har blivit allt viktigare att nå – ofta i konkurrens mellan olika fackliga organisationer. Många fackliga organisationer söker därför att i större utsträckning marknadsorientera sin verksamhet. För att göra medlemskapet mer attraktivt och för att stå starkare lägger de ned större kraft på att lära mer av nuvarande och presumtiva medlemmar samtidigt som de följer konkurrerande organisationer mera noggrant.

De marknadsorienteringsmetoder som då används har i huvudsak utvecklats utanför den fackliga organisationsvärlden. Avhandlingen söker bidra till att täcka en del av det kunskapsbehov som då uppstått. Den behandlar bland annat hur fackliga organisationer kan organisera sig för att bli bra på att lyssna och lära av medlemmarna. Det empiriska underlaget är samlat genom djupstudier inom Sif, en svensk organisation som organiserar tjänstemän inom industrin. Sif är en av de ledande fackliga organisationerna i Sverige. Under senare år har verksamheten blivit alltmera inriktad på att tillgodose också individuella behov hos medlemmarna. Organisationen har använt sig av olika typer av kvantitativa attitydundersökningar och även av kvalitativa studier för att utvärdera och förändra sin verksamhet. I detta sammanhang har jag studerat användandet av Sif-Barometern, en årlig kvantitativ undersökning syftande till att beskriva medlemmars tillfredsställelse med olika delar av organisationens verksamhet. Min forskning har vidare inneburit att jag lagt särskild omsorg vid att studera och bidra till utvecklingen av en metodik för designdialoggrupper. Denna metodik har lånat drag från metodiken för fokusgrupper och är ett verktyg för att bli mera lyhörd för medlemmarnas åsikter och behov. I korthet innebär metoden för designdialoggrupper att en grupp med 4-10 personer under två timmar arbetar och samtalar med en moderator (diskussionsledare) från Sif. Det kan exempelvis vara medlemmar som har chefsbefattningar och som därför bjuds in för att samtala om hur Sifs service till en egna yrkesgruppen kan utvecklas. Samtalet följs på en TV-monitor av Sif-anställda med uppgiften att dokumentera och vidare utveckla de idéer och kunskaper som dialoggruppen bidrar med. Därefter används resultaten för att utveckla tjänster (eller, i vissa fall, strategiska positioner).

Forskningsfrågor, teori och metod

Fackliga organisationer styrs dels som ett företag, av en ledningsgrupp med underlydande chefer (administrativ rationalitet), dels genom demokratiskt deltagande av medlemmar och förtroendevalda (representativ rationalitet). Användande av marknadsorienteringsmetoder kan upplevas som en nedvärdering av betydelsen av de förtroendevalda som länk till marknaden (medlemmar och presumtiva medlemmar samt konkurrenter). En annan potentiellt försvårande faktor är att det är förtroendevalda medlemmar – och inte anställda – som utför det mesta arbetet i fackliga organisationer. Användandet av marknadsorienteringsmetoder kan däremot förväntas ligga främst i händerna på den professionella (anställda) organisationen. Därmed kan det bli svårare att koordinera organisationens aktiviteter med utgångspunkt från insamlad marknadsinformation.

Samtidigt finns det särskilda fördelar med att använda marknadsorienteringsmetoder i fackliga organisationer. Behovet av marknadsinformation kan vara större i organisationer som inte kan använda traditionella försäljnings- eller avkastningsmått för att utvärdera och styra sin verksamhet. Eftersom medlemmarna betalar en fast månadsavgift oavsett vilka tjänster de nyttjar, ger medlemstalen en mycket svag indikation om värdet av olika specifika tjänster som erbjuds. Dessutom har fackliga organisationer – åtminstone formellt – en specifik kultur och värderingar som mer än i vinstdrivande företag sätter medlemmen/kunden i centrum. Den fackliga verksamhetens syfte är ju att stödja medlemmar och tillgodose medlemmars behov. Vidare kan den ömsesidiga känsla av solidaritet som föreligger mellan medlemmar och deras organisation underlätta nyttjande av marknadsorienteringstekniker.

Med utgångspunkt från konstaterandet att fackliga organisationer kan vinna på att använda marknadsorienteringsmetoder har följande forskningsfrågor ställts:

- I vilken omfattning är fackliga organisationer kapabla att använda information som inhämtats genom nyttjande av marknadsorienteringsmetoder för strategisk positionering av organisationen och för innovation av tjänster att erbjuda medlemmarna?
- Vilka faktorer har varit särskilt svåra att hantera när marknadsorienteringsmetoder har nyttjats i ett fackligt sammanhang och vilka faktorer har underlättat användandet av dessa metoder?
- Hur kan marknadsorienteringsmetoderna och användandet av dem utvecklas så att de bättre bidrar till strategisk positionering och tjänsteutveckling i fackliga organisationer?

- Vilka allmänna slutsatser kan dras om utformning och användning av marknadsorienteringsmetoder i fackliga organisationer i allmänhet?

Det teoretiska ramverket baseras i huvudsak på marknadsorienteringsteori och specifika aspekter av marknadsorientering för fackliga och ideella organisationer. Narver och Slater (1990: 21) har givit följande definition: "Marknadsorientering är den organisatoriska kultur som med störst produktivitet och effektivitet skapar de beteenden som är nödvändiga för att skapa överlägset värde för köpare och, därigenom, överlägset resultat för verksamheten". Narver och Slater definierar också tre innehållsliga komponenter i marknadsorientering:

- *Kundorientering*, innefattande förståelse av önskade kunder på kort och lång sikt,
- *Konkurrentorientering*, innefattande införskaffande av information om nuvarande och potentiella konkurrenter,
- *Interfunktionell koordination*, vilket är ett samordnat nyttjande av resurser för att skapa överlägset värde för önskade kunder.

Ett av avhandlingens teoretiska bidrag är dess utveckling av metoder för marknadsorientering inom två för fackliga organisationer centrala områden: *strategisk positionering* och *tjänsteinnovation*. Strategisk positionering syftar till att långsiktigt profilera organisationen med utgångspunkt från medlemmarnas behov och i förhållande till konkurrenter. Tjänsteinnovation syftar till att utforma tjänster som gör det möjligt att vinna och bibehålla medlemmar. I Tabell 1 nedan har bl a de innehållsliga komponenter som föreslagits av Narver och Slater använts för att precisera dessa skillnader.

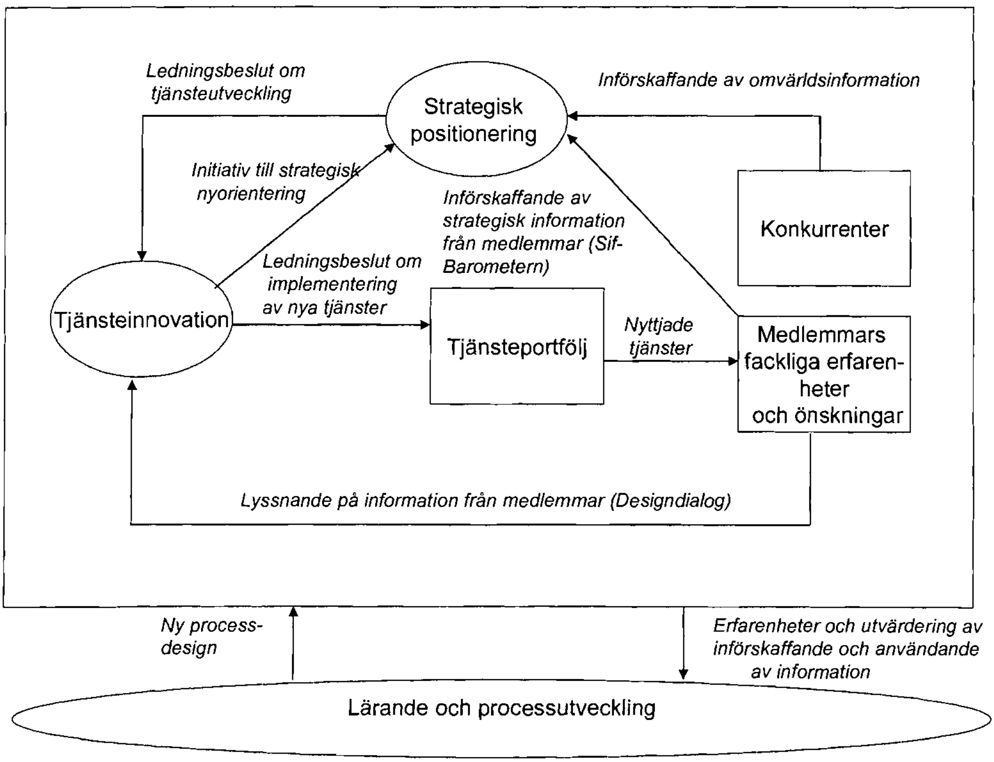
Tabell 1. Strategisk positionering och tjänsteinnovation som specifika ändamål för marknadsorientering.

Egenskaper	Strategisk Positionering	Tjänsteinnovation
Syfte	Utvärdera och hantera osäkerhet genom ledningens styrning mot specifika mål och framtidsbilder.	Organisationens hantering av osäkerhet i relation till design av nya produkter, tjänster, marknader, processer
Tidsperspektiv	Långt och medellångt perspektiv	Ofta kortsiktigt
Bidrag från marknadsinformation	Kunskap om organisationens resultat genom medlemsattityder; slumpmässigt valda medlemmar representerar hela kollektivet eller specifika målgrupper	Nya tjänstekoncept och kunskap och tjänstedesign; Kunskap om kundbehov; Möjligheter för medlemmar att deltaga och bli uppskattade för sina individuella idéer; Kreativitet; Divergerande idéer
Användning av marknadsinformation	Utvärderar inriktningsbeslut och genomförda förändringar	Utveckling av innovationsområden
Innehåll		
Kundorientering	Svarar på frågor rörande marknadsmöjligheter och hot	Koncept och kunskaper skapade av medlemmar
Konkurrentorientering	Visas exempelvis genom relativa nöjdhetsmått	Förstahandskunskap genom medlemmens erfarenhet rörande tillgängliga alternativ
Interfunktionell koordination	Spridning av aggregerad, strategisk marknadsinformation	Representanter för olika funktioner deltar i dialog med individuella medlemmar
Processer		
Skapande av marknadsinformation	Kvantitativa metoder, centraliserad funktion	Information samlas av dem som ska använda informationen, exempelvis medlemmar i ett utvecklingsprojekt.
Spridning av information	Spridning av marknadsinformation användbar för strategisk utveckling och styrning	Spridning genom nerifrån-upp-processer.
Förmåga att använda marknadsinformation	Nödvändighet att formulera och utvärdera mål på strategisk förbunds-övergripande nivå	Förmåga att hålla liv i och utveckla kreativa idéer

Forskningsarbetet har lagts upp enligt moderna idéer om "kollaborativ forskning". Jag har varit anställd av Sif i många år – och har fortsatt att vara det igenom hela processen. Jag har alltså sökt att kombinera min roll som anställd med min roll som forskare och dra nytta av denna kombination. Forskningsprocessen beskrivs bäst som ett aktionsforskningsprojekt, där jag, tillsammans med kolleger inom Sif, undersökt ett problem, utarbetat handlingsplaner för förändring och därefter prövat och utvärderat dessa. Sedan har detta fortgått, så att nya handlingsplaner utarbetats, etc. För att uppnå stringens och kontroll i arbetet har vi också löpande stämt av tolkningar och resultat med forskare som stått utanför organisationen. Aktionsforskning syftar längre än till att enbart beskriva och förstå ett skeende, syftet är också att uppnå förändring. Såväl ur mitt som ur Sifs perspektiv har alltså min forskning syftat till att förbättra organisationen, att få Sif att bli bättre på att lyssna på och lära från sina medlemmar.

Forskningsprocessen har följt och understött tjänsteutvecklingsprocessen i Sif, vilken beskrivs i Figur 1 nedan.

Figur 1. Ett ramverk för strategisk positionering, tjänsteinnovation och utveckling av marknadsorientering i fackliga organisationer.



Resultat och diskussion

Delresultat från mina studier har presenterats i sex artiklar, varav två publicerats i vetenskapliga tidskrifter och en artikel är utgiven som kapitel i en bok. Dessutom har en artikel accepterats för publicering medan två är under granskning. Artiklarna sammanfattas i avhandlingens kapitel 6 och är dessutom bilagda till denna avhandling. Nedan finns därför endast några ledtrådar om innehållet

1. *Membership Interface Unionism: A Swedish White-Collar Union in Transition*
Beskriver Sif som en organisation som söker utveckla en medlemsnära facklig strategi. Tony Huzzard är medförfattare.

2. *Political Entrepreneurship in Action Research: Learning from two cases*
Beskriver forskarens roll som politisk entreprenör i forskning som involverar anställda medlemmar i organisationer som studeras. Mats Sundgren är medförfattare.

3. *Customer satisfaction studies as tools for strategic positioning. A case study*
Studerar nyttjande av Sif-Barometern och beskriver hur dess användbarhet och användning kan förbättras.

4. *Service Innovation. A Collaborative Approach*
Beskriver hur designdialoggruppsmetodiken utvecklats och utvärderar dess funktioner.

5. *Design Dialogue Groups as a Source of Innovation: Factors behind Group Creativity*
Utvärderar designdialoggrupperna och föreslår designprinciper för ökad kreativitet i grupper.

6. *A Strategy for Enhancing Trade Union Learning from Members*
Utvärderar användandet av koncept och kunskaper som genererats ur dialoggrupper och föreslår designprinciper relaterade till lärande från medlemmar/användare. Horst Hart är medförfattare.

Sammanfattningsvis har jag funnit att de studerade marknadsorienteringsmetoderna har bidragit till strategisk positionering och tjänsteinnovation.

Sif-Barometern – ett verktyg för strategisk positionering

Sif-Barometern har använts för en årlig uppföljning av organisationens resultat och denna information har spridits i organisationen. Barometerresultat har också påverkat vissa strategiska val och prioriteringar inom organisationen. Däremot har användandet varit problematiskt i så motto att man önskat använda Barometerresultat också för operativ planering av den löpande verksamheten, trots att den insamlade informationen i huvudsak varit av strategisk karaktär. Vidare har organisationens förmåga att formulera mål och att använda Sif-Barometerns resultat i utvärderings- och utvecklingsarbetet varit relativt svag, vilket delvis sammanhänger med bristande metodkunskaper hos chefer och medarbetare. Vidare synes vissa organisatoriska, kulturella och politiska faktorer ha förhindrat en bättre användning av erhållna resultat.

För att öka nyttan av marknadsorienteringsmetoder för strategisk positionering kommer jag fram till att följande utmaningar måste hanteras:

- Motverka ledarskapets tendens att bortse från viktig men besvärande information.
- Ta fram information om medlemmars tillfredsställelse som uppfattas som användbar.
- Ta fram information om hur tillfredsställda medlemmar inom olika medlemssegment är med skilda aspekter av organisationens tjänster och verksamhet.

Nedan följer de designprinciper som föreslås i syfte att hantera de tre ovan nämnda utmaningarna:

- Syftena bakom en marknadsstudie ska vara tydligt uttalade och studiens design måste vara tydligt relaterad till dessa syften.
- Undersökningens tekniska kvalitet måste vara oomstridd. Detta kräver inte endast en undersökning av hög kvalitet, utan även:
  - god kompetens hos de ansvariga utredarna/köparna av marknadsinformation inom organisationen,
  - tillitsfulla relationer mellan utredare och chefer,
  - tillräckliga kunskaper hos chefer rörande de använda undersöknings- och analysmetoderna.
- Organisationens ledning ska aktivt använda och öppet uttrycka sin tillit till undersökningsresultaten.
- Eftersom användande av marknadsinformation kräver metodkunskaper bland chefer och medarbetare, bör kunskapsbrister identifieras och avhjälpas.
- Ett brett deltagande från chefer och anställda vid skapandet av ett undersökningsinstrument tenderar att öka undersökningens legitimitet och intresset för undersökningen och dess resultat.
- Användare (medlemmar) ska involveras i arbetet med undersökningens design, i syfte att utveckla mått som är relevanta utifrån deras uppfattning av organisationen.
- I samband med att organisationer utvecklar sitt användande av undersökningar rörande kundtillfredsställelse, ska politiska beteenden som hindrar en effektiv användning av resultaten, bemötas.

Metoden för designdialoggrupper – ett verktyg för tjänsteinnovation

Metoden för designdialoggrupper har varit mycket populär bland deltagare och bland de interna tjänsteutvecklare som involverats. Problem har dock identifierats rörande användning och spridning av erhållna resultat. Vidare är det en svaghet att metoden som sådan och dess möjligheter är relativt okänd på ledningsnivå.

De utmaningar som identifierats rörande tjänsteinnovation är de följande:

- Organisera användarinvolvering för att nå höga kreativitetsnivåer i grupper.
- Organisera lärande från användare: Förbättringar av förmågan att använda nya koncept och ny kunskap.
- Förbättra spridning av resultat utanför den involverade projektgruppen.

En rad designprinciper föreslås för att komma till rätta med dessa utmaningar. De första berör kreativitet i grupper:

- Deltagare med relevanta kunskaper för ett visst problemområde kan väljas ut med utgångspunkt från deras egna bedömningar av sina kunskaper, förutsatt att de får tillräcklig information om gruppen och uppgiften.
- Om man önskar producera originella idéer, ska man inte bjuda in experter med djupa kunskaper inom det aktuella området att delta i grupperna. Om man istället vill finna idéer som är lätta att omsätta vid utveckling av nya aktiviteter, tjänster och produkter, kan det vara lämpligt att rekrytera experter.
- Internt rekryterade moderatorer av gruppens arbete bör användas, eftersom dessa har en fördel i jämförelse med externa konsulter, beroende på sin bekantskap med problemområdet och att de av deltagarna lättare uppfattas som kunniga och engagerade i uppgiften.
- Man bör överväga att använda interna moderatorer som är experter på uppgiften, eftersom dessa kan ha en fördel i interaktionen med deltagarna och när det gäller att fokusera diskussionerna till viktiga frågor.
- En blandning av individuella arbetsuppgifter och gruppövningar ökar deltagarnas engagemang i arbetet och resulterar såväl i bredare beskrivningar av erfarenheter som fler idéer.
- Rädsla hos deltagarna för utvärdering av dialoggruppens arbete och resultat bör och kan undvikas genom att garantier ges för att resultaten inte kommer att spåras till individer eller specifika grupper.
- För att åstadkomma hög produktivitet i en dialoggrupp bör uppgifter delas in i specifika underuppgifter, vilka behandlas under strikta tidsgränser. Vidare bör regler för presentation av resultat vara tydligt uttryckta.
- Moderatorns förmåga att engagera alla deltagare måste betonas.
- Frivilligt deltagande ökar motivationen att lösa den givna uppgiften.
- Ett gruppklimat som kännetecknas av tillit och trygghet är lättare att etablera om deltagarna inte känner varandra närmare sedan tidigare.

Dessutom föreslås designprinciper som syftar till att öka projekt/arbetsgruppers lärande från dialoggrupper och andra former av användargrupper och för spridning av resultat:

- Engagemangsnivån ökar när förberedelsearbetet läggs upp så att arbetsgruppen och moderatorn är involverade i hela processen (planering – genomförande – utvärdering).
- Användargruppmöten måste vara noggrant koordinerade med övriga delar av tjänsteutvecklingsarbetet i syfte att bidra med koncept och kunskaper i rätt fas av utvecklingsprocessen.

- Arbetsgruppens medlemmar – och särskilt moderatorn – måste vara väl insatta i den använda metodologin.
- Arbetsgruppens medlemmar ska ges väl beskrivna dokumentationsuppdrag medan de följer användargrupperna.
- Processresultat i form av funna koncept och kunskaper förbättras om arbetsgruppen möts för att utveckla koncepten ytterligare.
- Design och användande av specifika konceptutvärderingar ska beslutats av arbetsgruppen.
- Särskilda insatser måste planeras och genomföras för att säkra att resultat från användargrupper – i form av kreativa idéer – skapas och sprids i organisationen.

Ett särskilt problem berör *double-loop learning* – lärande att ifrågasätta och ändra tidigare förhärskande perspektiv – för att förbättra användandet av marknadsorienteringsmetoder (Argyris och Schön, 1974). Fyra förslag för ökad *double-loop learning* ges i avhandlingen:

- *Kunskap stimulerar lärande:* Användning av marknadsinformation kräver att chefer och medarbetare har kunskaper om de verktyg som används – annars är det svårt att använda och göra bra tolkningar av resultaten.
- *Task alignment är en fungerande strategi för lärande i mikroklimat:* Lärande genom ändringar i arbetssätt är det centrala elementet i en *task alignment*-strategi (Beer et al., 1990). Utgångspunkten är att generella programmatiska förändringar sällan fungerar. *Task alignment* handlar istället om att i enskilda enheter av organisationen utveckla nya beteenden och kunskaper. En sådan strategi syftar till att öka lärandeförmågan i organisationen, inte endast genom hantering av långsiktiga utmaningar, utan också genom omedelbara lösningar på tydliga problem i den löpande verksamheten.
- *Aktionsforskning kan bidra till double-loop learning genom ett konsekvent användande av reflektion för att uttolka planerade och vidtagna åtgärders effekter:* Aktionsforskningsmetoder utgår från "lärande genom förändring" och kan därför vara nyttiga verktyg för organisatorisk utveckling.
- *Diskutera skillnader mellan espoused theories (vad man säger att man gör) och theories-in-use (vad man gör i verkligheten)!* Skiftande politiska beteenden som förhindrar *double-loop learning* har identiferats. En bred delaktighet och ett stort engagemang från chefer och medarbetare då marknadsorienteringsinstrument utvecklas har visat sig bidra till öppna och tillitsfulla diskussioner syftande till att förstärka *double-loop learning* i organisationen.

Avhandlingens resultat på en mera övergripande nivå kan sammanfattas i svaren på tre frågor.

Är marknadsorienteringsmetoder användbara för fackliga organisationer?
Studien har visat att marknadsorienteringsmetoder har varit användbara i Sif och har inte indikerat att de generellt sett skulle vara olämpliga i fackliga organisationer. Den komplexa ledningsstrukturen i fackliga organisationer, vilken beskri-

vits ovan, har alltså inte visat sig förhindra användningen av marknadsorienteringsmetoder.

Ställer användandet av marknadsorienteringsmetoder några särskilda krav på fackliga organisationer?
De metoder som beskrivs i studien är knappast specifika för fackliga organisationer – motsvarande metoder används i många typer av organisationer. Någon särskild anpassning av marknadsorienteringsmetoder för fackliga organisationer bedöms inte som nödvändiga – vid sidan av den metodanpassning som alltid bör ske vid introduktion av nya arbetssätt i en organisation.

Är det svårare att nyttja marknadsorienteringsmetoder i andra fackliga organisationer än i Sif?
På det hela taget finns det inget i denna studie som visar att det är väsentligt svårare eller lättare att nyttja marknadsorienteringsmetoder i fackliga organisationer än i andra verksamheter, men Sif kan ha lättare att använda dessa metoder än vissa andra fackförbund. Sifs specifika karaktäristika kan därmed också ses som anvisningar på drag som även andra organisationer kan behöva utveckla för att framgångsrikt kunna använda sig av marknadsorienteringsmetoder. Min slutsats är att tre specifika faktorer är viktiga för en framgångsrik användning av marknadsorienteringsmetoder i fackliga organisationer:

1. *Organisationskultur*: Det måste vara accepterat att man lyssnar direkt på medlemmar och presumtiva medlemmar. Man måste också uppfatta medlemmarna som personer med individuella behov.

2. *Medlemsmarknadsposition*: En stor "marknadsandel" inom de segment man riktar sig mot gör det lättare att nyttja marknadsorienteringsmetoder framgångsrikt, eftersom man då har legitimitet "på marknaden". Dessutom bidrar de medlemmar man redan har till intern förståelse för vikten av att lyssna till gruppen och kan därutöver effektivisera de undersökningar man avser att göra, genom att de är lättare att nå. Då nya marknader uppstår (exempelvis att nya branscher växer), tar det ofta lång tid att bygga upp en stor marknadsandel. Detta arbete kräver en uthållig strategi och ett tydligt ledarskap över en lång följd av år. En väg att hantera detta kan vara att inrikta sig på väldefinierade mindre segment av den nya marknaden istället för att söka uppnå önskat medlemsantal genom en allmän breddning av organisationens rekryteringsområde. Sålunda kan fusioner medföra risker för ett försvagat strategiskt fokus.

3. *Finansiell status*: Att utveckla och utnyttja marknadsorienteringsmetoder kräver resurser, inte minst för lärande i organisationen. Ekonomiskt svaga förbund med "små marknadsandelar" kan därför möta problem. Det gäller då att tålmodigt bygga starkare förutsättningar. En väg är att genom strategiska tjänsteinnovationer (vilka inte nödvändigtvis är resurskrävande) utveckla en förbättrad medlemsservice och mera attraktiva tjänster – eventuellt i samver-

kan med andra aktörer – för att på så vis successivt stärka sin position. Om sådana insatser leder till ett ökat medlemsantal, ökar också möjligheterna till en utvecklad marknadsorientering.

Sammanfattningsvis, marknadsorienteringsmetoder kan bidra till facklig förnyelse, kännetecknad av ett starkare fokus på individen.

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