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# Routines and Creativity: From Dualism to Duality

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Whereas scholars have historically treated routines and creativity as contradictory concepts, I adopt a dynamic ontology of routines that recasts them as a duality. Using data from a case study at a midsize retail organization, I theorize that artifacts, auxiliary routines, and external comparisons shape the enactment of routines that accomplish seemingly contradictory patterns of novelty and familiarity. From this analysis, I theorize two mechanisms—personalizing and depersonalizing—to explain how enacting a routine can produce patterns that allow an organization to achieve recognizable creativity on an ongoing basis. The findings contribute to research by theorizing the routine as a central concept that explains the ongoing accomplishment of recognizable creativity. By theorizing routines as an inherent part of creativity, and creativity as an inherent part of routines, I shift the way that scholars have traditionally viewed how organizations foster creativity among employees. For routine dynamics research, this study elaborates on the agency of routine actors who skillfully integrate their idiosyncratic backgrounds and experiences with the routine in ways that create complex patterns. It also unpacks the pivotal role of broader contexts and nonroutine actors in shaping routines.

*Keywords:* routines; creativity; change

*History:* Published online in *Articles in Advance* April 26, 2016.

## Introduction

To some people the combination of routines and creativity is an oxymoron (Cohendet et al. 2014). Creativity, by its very nature, involves novel performances (George 2007) and serves as a foundation of change (Woodman et al. 1993). In contrast, routines promote stability (Cyert and March 1963) and serve as a foundation for preserving the status quo (Hannan and Freeman 1984). Amabile (1997, p. 51) contrasts the “production of new, useful ideas for innovative business growth and the continuance of old, progressively less useful routines.” Some scholars even suggest that a reliance on routines might impede creativity (Amabile and Conti 1999). As Gilson and colleagues (2005, p. 527) put it, “The core of the creativity paradigm is enhancing variation . . . whereas the core of standardizing is minimizing variation . . . teams that are overly constrained by . . . routines may be unable to reap the benefits of creativity.” It appears that for many scholars routines and creativity are inherently contradictory (Ford and Gioia 2000).

Despite this characterization of routines and creativity, some scholars have suggested a more complimentary relationship between routines and creativity. For example, research explains reoccurring instances of creative performances by focusing on how certain routines structure work (Becker and Zirpoli 2009, Hargadon and Sutton 1997, Sutton and Hargadon 1996). Other research suggests that routines enable creativity by preserving cognitive resources on some tasks, something that frees cognitive resources for more creative tasks (Ohly et al. 2006). Although these approaches explain important ways that routines might foster creativity, they overlook how routine

work is often inherently creative and how routines can endogenously lead to creative outcomes (versus freeing up resources or structuring work to allow for creative outcomes through other means). Scholars have not elaborated these deeper connections between routines and creativity because the dominant ontology of routines focuses on stability, control, and preserving the status quo—concepts thought to be at odds with creativity.

Recently, scholars have posited a dynamic ontology of routines that invites a reconsideration of the relationship between routines and creativity (Dionysiou and Tsoukas 2013, Pentland and Feldman 2008, Turner and Fern 2012, Turner and Rindova 2012, Zbaracki and Bergen 2010). According to a routine dynamics approach, routines necessarily involve creativity because actors regularly exercise agency in moving between revising abstract patterns of routines and devising ways to engage in situationally relevant performances of routines (Feldman and Pentland 2003).

Beyond the creativity inherent in routine dynamics—that is, from actors agentially enacting routines in ways that subsequently shape, as opposed to only being shaped by, routine patterns—routine dynamics may also lead to creative outcomes. This deeper connection between routines and creativity has been hinted at (e.g., Salvato 2003, 2009) in the extant literature but not yet fully elaborated. An obstacle to developing this point of view comes from scholars who have largely treated creativity and routines as a dualism and therefore as inherently contradictory. For example, Ford and Gioia (2000) state that “creative actions represent variations from established routines” (p. 705), emphasize distinguishing “creative

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from routine decisions” (p. 709), and note that managerial choices “range from novel (original) solutions to common (well-known or routine) solutions” (p. 713).

The genesis of this study occurred as I conducted field research at a retailer that operates a chain of women’s boutiques. As a chain, the organization seeks performances that are familiar throughout its geographically dispersed stores. As a boutique, the organization seeks performances that are novel across locations. I came to label this phenomenon as “familiar novelty.” Familiar novelty captures the familiarity necessary to run a chain with a coherent identity. It proposes that even when regularly engaging in creativity, patterns emerge that allow observers to recognize the organization across time and space (i.e., between stores) (Birnholtz et al. 2007). Novelty captures the ongoing newness needed to run a boutique. It suggests that even when regularly enacting a routine, newness can continuously emerge (Feldman 2000). These empirical observations led me to question the typical dualism between creativity and routines and develop theory about how creativity and routines are a duality, mutually constitutive of each other rather than as separate and opposed concepts (Farjoun 2010). At the onset of my study, the very concept of a chain (i.e., emphasis on the familiar) of boutiques (i.e., emphasis on novelty) was difficult to comprehend when embracing the traditional dualism between routines and creativity (for a review, see Farjoun 2010, Tsoukas and Chia 2002). By shifting to a routine dynamics perspective, it became possible to recast this dualism as a duality and explain how organizations can regularly produce recognizable creative outcomes. Instead of relying on perspectives that might suggest that creativity primarily comes from personal (e.g., personality and cognitive style) or situational (e.g., job complexity and rewards) factors (Shalley et al. 2004), I elaborate on the routine as a central explanatory concept for creativity. To understand this central role of routines requires adopting a routine dynamics perspective and posing the following research question: *How do organizations continuously achieve recognizable creative outcomes through routines?*

My empirical investigation and subsequent theorizing of familiar novelty provides a means to understand how routines are endemic to creativity just as creativity is endemic to routines. It directs attention to explaining a much deeper connection between routines and creativity by unpacking the production of complex patterns and performances of familiar novelty that accomplish ongoing creativity, a core aim of many organizations (Catmull 2014). A focus on how routine dynamics shape creativity also builds on research which has started to theorize how routines can accomplish seemingly contradictory objectives (D’Adderio 2014, Turner and Rindova 2012) and create complex patterns (e.g., Birnholtz et al. 2007). Accordingly, this work elaborates not only our understanding of creativity at work but also how routines enable and structure this creativity.

## Routine Dynamics and Creativity

Scholars define organizational routines as “repetitive, recognizable patterns of interdependent actions, carried out by multiple actors” (Feldman and Pentland 2003, p. 95). Historically, scholars have thought of routines as important for fostering stable action over time to enable standardization (Cyert and March 1963, Nelson and Winter 1982). These approaches do not emphasize the agency of the individuals enacting routines (Feldman 2000, Feldman and Pentland 2003), something that puts routine research at odds with creativity research which embraces an agentic view of individuals (Amabile 1996; Amabile et al. 1996, 2004).

Scholars typically define creativity as the production of novel and useful ideas (Amabile 1988). The requirement of usefulness eliminates the inclusion of novelty for the sake of novelty (i.e., creativity involves something that advances an organizational objective). George (2007, p. 444) describes creativity as “unpredictable” and as having “the potential to reduce levels of predictability and reliability.” This view reinforces the dualism between routines (which scholars often claim enhances reliability) and creativity (which scholars often claim undermines reliability).

A shift to treating routines and creativity as a duality invites a reconsideration of the long-standing separation between routines and creativity by examining the processes that inherently connect the two concepts. However, because scholars emphasize explaining creative outcomes while largely ignoring creative processes (Drazin et al. 1999, Shalley et al. 2004), they have overlooked a deeper connection between routines and creativity. More specifically, a focus on creative outcomes has led to two important consequences. First, the relationship between routines and creative outcomes is such that routines allow individuals to conserve cognitive resources so that they may deploy these resources for other tasks that produce creative outcomes (Ohly et al. 2006) or may guide work practices (such as brainstorming) in ways that also lead to creative outcomes (Hargadon and Sutton 1997). Creativity is neither examined as something endogenous to routine dynamics, nor is creativity viewed as a direct outcome of enacting routines.

Second, a focus on outcomes has masked the structuring that unfolds when organizations and their actors repeatedly engage in creative acts. Regularly acting creatively produces structures that inevitably shape subsequent creative acts (Drazin et al. 1999, Sonenshein 2014). Creativity scholars have largely overlooked this possibility because of their strong agentic assumptions. For example, research on creativity often posits intrinsic motivation as a key shaper of creativity, because when individuals sense contextual factors control them they have reduced intrinsic motivation and therefore produce less creative outcomes (Amabile 1996, Shalley et al. 2004)—although the empirical record is less conclusive (Shalley and Perry-Smith 2001). However, revising the relationship between

routines and creativity recognizes that creativity does not simply involve the intentional discovery of the new but also involves a synthesis with the old (Salvato 2003, 2009; Styhre 2006; Witt 2009), something that necessarily entails a focus on how the “old” structures subsequent creative activities.

Although the traditional characterization of routines and creativity invite treating them as a dualism, a shift to a more dynamic ontology of routines allows scholars to recast these concepts as a duality. Such a richer connection between routines and creativity starts with the view that routines not only have qualities of stability but also of change (Pentland and Rueter 1994). To unpack these qualities of stability and change, and the role of human action in shaping these dynamics, Feldman (2000) and Feldman and Pentland (2003) conceptualized routines as having two aspects: an ostensive aspect and a performative aspect. Ostensive aspects provide resources to guide and account for action, whereas performative aspects recreate, maintain, and modify ostensive aspects (Feldman and Pentland 2003, Parmigiani and Howard-Grenville 2011). Ostensive aspects capture the patterns that individuals constantly generate through specific actions across time and space. Individuals may also differ in their interpretation of ostensive aspects, because variations in interpretations can arise based on a person’s role and point of view (e.g., Turner and Rindova 2012). Employees match the demands of the specific context with their abstract understanding of the routine to perform that routine. In this way, the very act of performing a routine can be a creative exercise.

Routine dynamics not only inherently involve creativity but also may foster creative outcomes—something that suggests an even deeper connection between creativity and routines than scholars often recognize. Along these lines, Salvato (2003) finds that routines can lead to creative outcomes when individuals agentically mix routines with external factors. Salvato (2009) also finds that individuals can transform ambiguous stimuli into creative adaptations of baseline routines. D’Adderio (2014) examines how individuals agentically manage competing pressures to replicate and innovate. Turner and Rindova (2012) detail how organizational members address the potentially conflicting goals of consistency and flexibility through artifacts and connections that help sustain dual ostensive patterns. This focus on routine actors’ agency in a routine dynamics perspective better matches the assumptions of research on creativity, which historically emphasizes agency as a key impetus to creative outcomes (Amabile 1996; Amabile et al. 1996, 2004). At the same time, a focus on routines highlights the importance of structure in the creative process (see also, Hargadon and Sutton 1997), something frequently overlooked.

When treated as a duality, it becomes possible to examine empirically how organizations continuously

achieve recognizable creative outcomes using routines. Such an investigation offers a more process-oriented account of creativity to complement existing approaches that focus on variance explanation models (Drazin et al. 1999). A process oriented approach that positions routine dynamics at its center suggests that ongoing creativity need not be bounded to perpetually creative organizations (Hargadon and Sutton 1997) or individuals (Feist 1998). It also may not be limited to creative contexts scholars often seek out such as Hollywood (Elsbach and Kramer 2003), design (Garud and Karnøe 2003) or musicians (Kamoche and Cunha 2001). Rather, creativity is a natural part and consequence of enacting routines, just as structure is a natural part and consequence of creativity. Accordingly, from a routine dynamics perspective, it becomes possible to explain ongoing recognizable creativity that embraces the familiar and novel. By theorizing how creative and routine performances go hand in hand, this research widens the possibilities for creativity scholars beyond focusing on particular types of people (such as artists), personalities, and contextual factors (such as goals) to emphasize the routine as the locus of creativity—the very concept scholars often position as antithetical to creativity. At the same time, a focus on how two seemingly contradictory patterns—familiarity and novelty—emerge from routine dynamics provides a concrete account of how organizations create complex patterns across complex organizations, an important area of focus for routines scholars (Birnholz et al. 2007, D’Adderio 2014).

## Methods

### Case Selection and Overview

The current study is part of a larger project (Sonenshein 2014) that sought to understand change in a rapidly growing organization. It emerged from an observation I had in the midst of the original project around how employees enacted routines in ways that led to familiar patterns of action but that nonetheless differed across space and time. With this observation in hand, followed by an examination of the routine dynamics literature, I started reanalyzing my existing data using a single site case study design (Yin 1994) from the lens of routine dynamics. This design afforded me the opportunity to approach my data from a different perspective than the original project, which used grounded theory, and to observe patterns and processes previously unnoticeable.

I collected data from BoutiqueCo,<sup>1</sup> a fast-growing retailer based in the United States that operates a chain of approximately 400 clothing, jewelry, accessories, and gift stores. BoutiqueCo started as a family business but engaged in a rapid expansion that culminated in an initial public offering. As it grew, it used routines to coordinate among its large and geographically dispersed workforce. Similar to other retail organizations, or service industries more generally (Winter and Szulanski 2001), BoutiqueCo

sought familiar performances by employees across the chain such that each location was recognizable as a BoutiqueCo store. However, unlike many retail chains, it also sought out novel performances across locations such that each store appeared different. Routines seemed to spark ongoing novel actions across a geographically dispersed organization that nevertheless retained familiarity across time and space. Therefore, I stumbled upon BoutiqueCo as an appropriate case serendipitously, because I did not intend to study organizational routines. Nonetheless, BoutiqueCo is an appropriate case to address my research question because as a chain of retail stores, it has an important need to create familiarity across its stores. On the other hand, as an operator of boutiques, it inevitably needs to create a novel experience for its customers over time and across locations. Thus, BoutiqueCo provided an ideal context to understand how organizations can enact an imperative to produce constant, recognizable creative outcomes across its stores using routines.

### Data

I conducted 60 interviews, 19 with corporate managers and regional managers (including most of the top management team, referred to collectively as “corporate managers”) and 41 with store employees across the organization, which includes store employees and store managers (referred to collectively as “employees”). Table 1 provides an overview of the interview data, and Appendix A lists the interview questions. I recorded and had most interviews professionally transcribed. Interviews typically lasted between 30 to 60 minutes. I started interviewing accessible corporate managers who could provide an overview of the organization and moved to field employees located in stores in close proximity to my workplace (Morse 2007). From there, I branched out to interview other informants across the country, something that provided a means of observing routines in a variety of locations.

Because I was working from an existing data set and had already collected my data, I moved to theoretical sampling from my existing cases to hone in specifically on routine dynamics, particularly around how the organization’s routines created patterns of novelty and familiarity. I emphasized headquarter employees directly involved in shaping the routines as well as store employees responsible for implementing them. I selected informants in different locations to compare their enactment of routines with employees at other locations.

In addition to interviews, I conducted 62.5 hours of observation, mostly participant observation. These observations primarily occurred at two newly opening stores, including their initial setup, training, and first day of operations. During these participant observations, I wrote fieldnotes each evening after returning to my accommodations (Emerson et al. 2011). Furthermore, I collected 151 documents that provided important details about the routines my informants described. As I describe

below, each of these sources of data played an important role in the analysis.

### Analysis

As a single site case study, I treated the organization as the primary unit of analysis and sought to explain routine dynamics inside the organization and their role in helping the organization continuously achieve recognizable creative outcomes. This required examining my data for routines at the organization. As Pentland and Feldman (2005) note, scholars cannot treat routines as having monolithic structures. Therefore, with an eye toward identifying “repetitive, recognizable patterns of interdependent actions, carried out by multiple actors” (Feldman and Pentland 2003, p. 95), I primarily relied on the document archive to identify the organization’s key routines. Then I primarily used interview transcriptions with corporate managers and employees to identify the multiple ostensive patterns of these routines.

As my data analysis unfolded, the key concept of familiar novelty emerged as the empirical manifestation of the duality between creativity and routines. To identify familiar novelty, I sought out the intertwinement of both patterns (e.g., informants were doing something novel and something that would be recognizable as BoutiqueCo) in participants’ descriptions of their routines or routine performances. At times, as I describe below, other people, such as colleagues or managers, disagreed that routine performances accomplished familiar novelty, and they tried to redirect either understandings of and/or future routine performances. Accordingly, whereas I was guided by informants to locate examples of familiar novelty, I also unpacked the social processes at BoutiqueCo that helped arbitrate and shape the accomplishment of familiar novelty by fostering its collective understanding.

Finally, I primarily relied on interviews with routine actors (usually employees) and observations to understand routine performances (Pentland and Feldman 2005, p. 800). Whereas this analysis yielded several routines, I focused on what the data suggested was the most essential routine for the organization to accomplish ongoing, recognizable creative outcomes—merchandising. This routine was broadly used (e.g., carried out by multiple actors such as store managers, full-time employees, and part-time employees), frequently used (e.g., a critical part of the organization’s operations repeated weekly, sometimes daily), identifiable to employees (e.g., referred to explicitly in the data) based on interdependent actions (e.g., the output of one action served as the input to another), and considered by corporate managers and employees to be essential for the operation of the business. Whereas store managers were ultimately responsible for the operations of the store, merchandising was viewed as a collective responsibility. The result of this first step is a description

**Table 1 Overview of Interview Data**

Informant	Name	Work location	Position	# Interviews
1	Dana	Home Office	Director	2
2	Sue	Home Office	Director	1
3	Alexis	Home Office	Vice President	1
4	Christi	Multiple Locations	Regional Manager	1
5	Meghan	Store, S. Central	Store Manager	1
6	Lacy	Store, S. Central	Store Employee	1
7	Brianna	Home Office	Corporate	1
8	Zack	Home Office	Vice President	1
9	Erika	Store, Midwest	Store Manager	1
10	Erin	Store, Midwest	P/T Store Employee	1
11	Alicia	Store, Midwest	P/T Store Employee	1
12	Than	Store, Midwest	Keyholder	1
13	Abby	Store, Midwest	Store Manager	1
14	Elizabeth	Store, Midwest	Asst Store Manager	1
15	Ethan	Store, Midwest	Store Manager	1
16	Bethany	Store, Midwest	Store Manager	1
17	Ricky	Store, Midwest	Keyholder	1
18	Deanna	Store, Midwest	Keyholder	1
19	Ali	Store, Midwest	Store Employee	1
20	Wendy	Store, Midwest	Asst Store Manager	1
21	Lola	Multiple Locations	Regional Manager	2
22	Paige	Store, Midwest	Keyholder	1
23	Candy	Store, Midwest	Store Employee	1
24	Tracy	Store, West	Store Manager	1
25	Jill	Home Office	Corporate	2
26	Jessica	Store, West	Store Manager	1
27	Tamara	Store, West	Store Manager	1
28	Rachel	Store, West	Store Manager	1
29	Nora	Store, West	Store Manager	1
30	Jake	Multiple Locations	Regional Manager	1
31	Jollie	Store, East	Store Manager	1
32	Katrina	Store, East	Keyholder	1
33	Veronica	Home Office	C-Level Executive	3
34	Patty	Home Office	Founder	1
35	Krystal	Home Office	Vice President	1
36	Evan	Home Office	Founder	1
37	Becca	Home Office	Corporate	1
38	Peter	Home Office	Founder/CEO	1
39	Agatha	Home Office	Vice President	1
40	Nicky	Multiple Locations	Regional Manager	1
41	Catherine	Store, S. Central	Store Manager	1
42	Lily	Store, S. Central	Asst Store Manager	1
43	Marcy	Store, S. Central	Store Manager	1
44	Felicia	Store, S. Central	Keyholder	1
45	Waverly	Store, S. Central	Store Manager	1
46	Penelope	Store, S. Central	Asst Store Manager	1
47	Pheobe	Store, S. Central	Store Employee	1
48	Willa	Store, West	Store Manager	1
49	Carmen	Store, West	Keyholder	1
50	Jocelyn	Store, West	Asst Store Manager	1
51	Jackie	Store, Midwest	Store Manager	1
52	Nancy	Home Office	Corporate	1
53	Ella	Multiple Locations	Regional Manager	1
54	Pam	Store, Midwest	Asst Store Manager	1
55	Amber	Store, Midwest	Asst Store Manager	1

of the routine and an illustration of patterns of familiar novelty.

The second part of the analysis involved identifying routine dynamics that shaped familiar novelty and the corresponding mechanisms that explain how these dynamics

work. This led me to three domains in which routine dynamics shaped familiar novelty: artifacts, auxiliary routines, and external comparisons. Next, I reexamined the data using these three domains as filters to understand how each domain shaped familiar novelty. For this part

of the analysis, my overarching goal was to build up from informant's meaning-making how they interpreted routine dynamics shaping familiar novelty. I used open coding or in-vivo coding (Strauss and Corbin 1998) to capture informants' meanings related to routine dynamics. My analysis was also very iterative (Locke 2001), because I went through the data several times to work toward a more general and abstract set of mechanisms that explained how routine dynamics shaped familiar novelty. This required a constant dialogue between my data and existing literature to theorize mechanisms that were true to my data but broader than my particular context. This led to two key mechanisms: personalizing and depersonalizing. Finally, I iterated through multiple reflections on the data to understand its theoretical significance and the connections between findings. This step formed the basis of the process model presented that connected and theoretically generalized my data. Again reflecting the iterative nature of my project (Strauss and Corbin 1998), I went back and forth between my developing model and the data, making several refinements along the way.

### Merchandising at BoutiqueCo

The merchandising routine plays a central role at BoutiqueCo. It allows the organization to create patterns of familiarity and novelty in its display of products across the chain. Each store appears different even as it retains the sense that it is a BoutiqueCo. Accordingly, the merchandising routine is strategically vital for the company because it allows the organization to achieve the size and scale of a national chain that stand-alone boutiques cannot obtain, while having the uniqueness across locations that other chains have difficulty accomplishing.

Based on my analysis of documents, as well as observations and interviews with employees and corporate managers, I find that the merchandising routine involves the following steps. First, employees unpack cardboard boxes they receive from a central warehouse. These boxes contain merchandise, such as clothing, jewelry, and accessories. Customers ultimately purchase these products. After unpacking the boxes and evaluating the merchandise inside of them, employees select the products they will bring to the floor. Employees put other products into storage. Employees then engage in the most crucial parts of the routine. They must place the product on a fixture, such as a mannequin or table. Additionally, they must integrate the product with existing merchandise already displayed throughout the store. The goal is to create a visually compelling "look and feel" of the store. In this sense, even when employees merchandise at a particular time by themselves, they coordinate with other employees to create a coherent look and feel of the store. For example, if someone is working on a jewelry table, another employee might work on a different table, such as an accessory table. One way employees coordinate

these performances is through referencing key artifacts to help create these displays, which provide rules for how to merchandise. They also observe how employees merchandise other parts of the store. Employees also constantly maintain and revise displays as customers purchase and move products around. Additionally, employees revise existing merchandising displays and rearrange substantial parts of the merchandise to create new looks, based on events such as holidays or because they think that the store has become stale looking. Furthermore, merchandising happens across the entire chain on a regular basis. As a result, the merchandising routine is inherently a collective accomplishment, even if some of its visible manifestations involve only a single individual. It depends on achieving familiar novelty at each location to constitute a chain of boutiques. For the merchandising routine, this means simultaneously creating a different display of merchandise compared to other stores, while retaining the sense that the merchandising in a specific store is consistent with other stores. BoutiqueCo is only recognizable as a chain of boutiques when each of its stores creates novelty that nonetheless retains the familiarity that people associate with the organization. Familiarity without enough novelty can unravel the organization by starving the routine performances of new ideas. Similarly, novelty without enough familiarity can unravel the organization by starving routines of the familiar patterns needed to accomplish a coherent set of performances.

Abby (13)<sup>2</sup> summarizes her objective with performing the merchandising routine to create stores that are "different" and that are "a true reflection of not only myself but my staff," even as those stores conform to a "BoutiqueCo" style. For example, Lily (42) describes the successful accomplishment of familiar novelty as follows: "You kind of take on the store as your own and *just kind of personalize it and still kind of keep it BoutiqueCo, but each store is very different*" (emphasis added).

To provide more concrete details of familiar novelty, Jake (30) explains, "We do have a basic guide of standard. Like... a lamp and a flower on a table, or you know, making sure that our products are in bowls. But I mean, in terms of the way that the store is merchandised, it is really entirely up to the specific boutique. So that's the consistency piece... We do have a visual merchandising manual. Like it gives us a guide, but it's merely a guide. It's not the implementation." As Jake points out, familiar novelty entails following the consistency piece established by artifacts such as the visual merchandising manual but equally involves creativity to determine how to merchandise the store. In Jake's example, creativity cannot exist without the familiarity that comes from the artifact that serves as a guide as well as the novelty that comes from implementation of that guide in unique ways.

Tracy (24) provides additional details as she explains the manifestation of familiar novelty in the merchandising routine. In contrast to other retailers that precisely detail

how employees dress mannequins, even down to the arm on which a specific color purse should hang, she notes, “I’ll be able to change out mannequins and change out displays and really see what works within my store. [Corporate managers] give you the basic guidelines, so you can follow the basic guidelines, and then from that just see what sort of thing works for your particular customer.” As she points out, familiar novelty involves the ability to achieve creativity in ways that bring both novelty to her store (e.g., designing the main mannequins that shape the look and feel of the store and prioritize which products to feature, which influences what sells) and familiarity (e.g., following the basic guidelines). This leads employees, like Christi (4), to observe, “There are limitations to what you can do for sure, there are boundaries that are things you do not do, but there’s a lot of room for your own creativity.” Sue (2), a member of the field management team, describes how she wants her group of stores to enact the merchandising routine: “I do want consistency and I have to maintain consistency, but we have to make each store feel like a boutique and not feel like it’s a national chain.” These statements indicate the ease at which Sue moves between recognizing, on one hand, the importance of familiarity (what she refers to as consistency), and on the other hand, the importance of novelty (what she refers to as making each store feel like a boutique versus a chain) in how employees merchandise their stores. As these examples suggest, the merchandising routine produces the enacted pattern of familiar novelty. Stores achieve creative outcomes across the chain that are both novel in their own way but familiar as BoutiqueCo. Zack summarizes the CEO’s take on these complex patterns

enacted through merchandising, “Peter expressed . . . that we view the company as an amoeba. It’s ever-changing and dynamic and focuses, you know for the most part, remain[s] the same.” What is less clear, however, is how the organization accomplishes these patterns of novelty and familiarity through routine dynamics.

## How Routine Dynamics at BoutiqueCo Enable Familiar Novelty

Drawing from data about the merchandising routine, I unpack how routine dynamics—manifested in artifacts, auxiliary routines, and external comparisons—enable familiar novelty. I theorize the corresponding mechanisms that explain how enacting routines enable patterns of familiar novelty: personalizing and depersonalizing. These mechanisms explain how employees work out the extent to which their self is (not) intertwined with the routine. I describe both the routine dynamics and theoretical mechanism in the main text below but provide additional supporting evidence in Table 2.

### Artifacts

Artifacts play an important part in how employees merchandise their stores, but in ways that differ from other retail organizations. Retailers frequently use a planogram to facilitate the merchandising routine. A planogram provides detailed instructions for how employees must set up a store, such as how to pair merchandise, organize colors, and build displays (such as through dressing mannequins). Peter (38), the CEO, describes them as follows: “Planogram is essentially a map of how do you

**Table 2 Additional Empirical Support for Mechanisms**

Routine dynamic	Theoretical mechanism
Artifacts	<p><i>Personalizing:</i></p> <ul style="list-style-type: none"> <li>Express yourself by remodeling the mannequins or fixing a table. (Katrina, 32)</li> <li>You’re able to design the mannequins how you envision . . . you can put your little personal creativity whenever they ask for something or you suggest something, you can put it in the visuals in the window displays. (Lacy, 6)</li> </ul> <p><i>Depersonalizing:</i></p> <ul style="list-style-type: none"> <li>There is one manual, one stop for information that we have consistency across the board and that we utilize that for the training of our new boutique managers . . . and I’m also responsible for managing our Internet site for the stores, which really goes hand-in-hand with the policy and procedure in terms of the digital example of the manual. (Dana, 1)</li> <li>The visual merchandise manual . . . corporate has set this up in terms of how—like what props to use in the windows, what props to use on the tables. What props—you know, how to make sure that they’re hung properly. So there is, you know, the manual. (Jake, 30)</li> </ul>
Auxiliary routines (hiring)	<p><i>Personalizing:</i></p> <ul style="list-style-type: none"> <li>I basically hire people sort of with the intention that each and every person is sort of different—has their own personality—has their own way of looking—the persona that they present. (Rachel, 28)</li> <li>Nicky (40) describes that she evaluates employees based on “how attached they are to their planograms; to see how much creativity . . . How have you been creative, or how did you think through it?”</li> </ul> <p><i>Depersonalizing:</i></p> <ul style="list-style-type: none"> <li>When I do interviews, I try to look into—I let them do most of the talking, and I try to get to experiences . . . to see how they would think, and then see if that would meet the way we do things here at BoutiqueCo. (Nicky, 40)</li> <li>Our visual manuals are important. Because if the manager isn’t—and that’s also an important part of the hiring process, is that when they’re interviewing that manager, does the manager see the importance of visual merchandising in the store and appreciate it beyond the planogram. (Krystal, 35)</li> </ul>

Table 2 (Continued)

Routine dynamic	Theoretical mechanism
Auxiliary routines (feedback informal)	<p><i>Personalizing</i></p> <ul style="list-style-type: none"> <li>You just get those times where you're kind of stuck and you're like, I cannot think of anything else to put here or do with this or I'm just brain-dead and there's no creativity happening, so it helps to bring somebody else in and kind of brainstorm with them about what might be a good idea. (Marcy, 43)</li> <li>I always encourage people to go into other people's stores...When you're struggling with something, to go check out and see how someone else does it, yeah, and to get some fresh and new ideas. (Christi, 4)</li> </ul> <p><i>Depersonalizing</i></p> <ul style="list-style-type: none"> <li>The first week I was here I spent it looking at different stores that we have, different BoutiqueCo stores, so a lot of it was looking at the details and realizing what works and what doesn't work. (Sue, 2)</li> <li>I kind of learned through the other employees. I saw how they interacted, and I guess through Samantha, and just experiencing how she set up the store and what BoutiqueCo expected the purses to look like. They wanted it to look a certain way, and then you just...absorb all that and learn through osmosis... You see it a certain way. They like things full and they want everything to look welcoming and brand new. (Lily, 42)</li> </ul>
Auxiliary routines feedback (formal)	<p><i>Personalizing</i></p> <ul style="list-style-type: none"> <li>We'll email them to the region. Like you know, this is a great example of you know, Mother's Day gifting table, and we've had so many different Mother's Day gifting tables out there, like that gave creative ideas out there... But then again, see, it goes back to the whole uniqueness of the boutique though... If we send out a specific table and say this is how we want that table to be implemented, then we might as well just create that concept look and say this is how we want it every season. (Jake, 30)</li> <li>We have a lot of postings we put in the Intranet...where we share a lot of—not just the policy procedures and memos, but we share a lot of pictures from stores that they send out. So, we have that line of communication, that I think helps them out to break through and break free. (Nicky, 40)</li> </ul> <p><i>Depersonalizing</i></p> <ul style="list-style-type: none"> <li>There's definitely a lot more feedback coming from the home office. Like, "Take pictures of what you did. We need to see those. This needs to be changed." (Wendy, 20)</li> <li>There is a safety net. And you only have that safety net if you need it. So, if you fall off the high wire, corporate...is going to be there to catch you. (Peter, 38)</li> </ul>
External comparisons	<p><i>Personalizing:</i></p> <ul style="list-style-type: none"> <li>At BoutiqueCo I think that you kind of get a little bit more freedom, and I think for somebody that wants to be creative, it's a little bit easier to do that and embrace that at BoutiqueCo, as opposed to other retailers that have planograms, like Ann Taylor Loft and Urban Outfitters are very "this is what you have to do" and you can't really steer far from it, as opposed to BoutiqueCo, you can—they give you direction and you don't necessarily have to put this here and this here. (Marcy, 43)</li> <li>Like Express and the Buckle and all of those have set floor displays, it's by the book, we just have freedom. (Erika, 9)</li> </ul> <p><i>Depersonalizing</i></p> <ul style="list-style-type: none"> <li>Whereas at Claire's they would hand you a planogram and they would say, make your store look like this... Five years ago, that was misinterpreted by me quite often. So, for me, the merchandising was very, very different, but as we've grown, we've gotten a lot more structured in how we train it, how we teach it, and how we follow up on it. (Lola, 21)</li> <li>When we hired Veronica...I think she tried to put in a lot of the experience she had. She had lots of experience at Banana, David's Bridal, Children's Place... And so we kinda let her run the way—like a retailer should, and I think that created lots of—I mean she didn't do the planogram. She knew that our model is different, but she did put lots of processes in that blocked creativity...and we had a meeting, and we went back to the other way, but maybe not all the way 'cause that was just too much freedom. Everybody was doing their own thing, and there was no consistency, and it was just a little chaotic because there was too much freedom. (Patty, 34)</li> </ul>

merchandise this store. Where do these purses go in the store? Where does this jewelry go? Where do these candles go?" When successfully implemented, employees at these stores with planograms believe that there should be no variance between a planogram's instructions and an employee's execution of those instructions. This follows the traditional role that artifacts such as formal rules play in standardizing behaviors (Leidner 1993). But managers at BoutiqueCo explicitly refuse to use a planogram. As Peter (38) said, "Planogram is like a four-letter word in BoutiqueCo." Instead, BoutiqueCo used another artifact, one that is easier to understand in

light of recent research, which suggests that artifacts can preserve employees' discretion by focusing on more general guidelines (D'Adderio 2008). Along these lines, the organization relies on the 107-page "visual merchandising manual," which contains rules for how employees should merchandise products, divided by product type (e.g., clothing, accessories, gifts, jewelry). Unlike a planogram, employees interpret the visual merchandising manual as providing "guidelines" but not fully determining how they merchandise. Yet, similar to a planogram, the visual merchandising manual coordinates the work of thousands of employees among hundreds of stores who create brand

consistent (i.e., familiar) merchandising that nonetheless reflect the novelty of a specific location and its specific employees.

To understand how the visual merchandising manual aids in the accomplishment of familiar novelty, I will dive into one illustrative product category—jewelry. The jewelry section starts as follows:

In this document you will find the core elements to successfully create a jewelry table. Remember, every store is different, so presentations may vary... the responsibility of a feature table is to highlight merchandise in a way that grabs the customers' attention. In this case, jewelry is what's on stage and the focus will be trendy, everyday classic, statement pieces, and celebration.

The document includes statements about novelty, such that every store is "different." Yet, the document also dictates the "core elements" of the display, something that suggests familiarity. The artifact then moves to providing rules around displaying jewelry:

There should be 2 areas of the store that showcase jewelry on rectangle tables, the front near the entrance and near the rear of the store... Each rectangle jewelry table should showcase all categories of jewelry... Each jewelry rectangle table should have earring trees; 2 per table... There should be 24–30 *t*-stands total for the 2 tables.

The artifact first prescribes where tables should be located, then it dictates the categories on each of those tables, and finally it specifies the fixtures that should be on those tables. Reflecting on these rules, Sue (2) interprets that the visual merchandising manual fosters familiarity because of "guidelines with how [employees] can lay out each table... There's a binder that's very specific as to how [employees] should display things, which we kind of have to abide by because we have so many stores and it's impossible for our visual team to go and check, so it's a good guideline." This serves as a way of depersonalizing the routine—namely, Sue interprets the routine as dictating invariant behavior that does not draw on the idiosyncratic background of the routine actor for its completion. Yet, this artifact also fosters novelty because employees can determine what they put on the fixture, thereby requiring that they personalize the routine by intertwining themselves with the routine. As Jake (30) describes, "When you go into a lot of retailers... they have this table... this color. That color. So everything is mapped out for them exactly. So here we don't have that. We have more of in terms of the consistency pieces, more of like the aesthetics of the feel... Making sure that the merchandise is color storied. The jewelry. Having the right jewelry neck cart. But we don't tell you what has to be on the jewelry carts." Jake's interpretation identifies both familiarity (such as the consistency piece) and novelty (such as putting specific pieces on the jewelry fixture) because the visual merchandising manual provides the

foundation for employee action but in ways that nonetheless encourage differences among routine performances. In this case, each store might have the same type and placement of fixtures, but the specific products on those fixtures will differ based on how the routine is performed by specific people at a specific time.

As Jake's comments suggest, fixtures serve as another key artifact that employees use. Fixtures structure the broad merchandising of the store and depersonalize certain aspects of the routine by constraining how employees enact the routine. As Sue notes, "Consistency is derived—for our stores it's derived from the fixtures. We try to maintain consistent amount of linear feet, hang space. We try to be consistent with how our fixtures are laid out... There's a pattern of how to lead our clients through the stores." These fixtures include mannequins, tables, and other structures to display merchandise. Thus, in performing the routine, employees accomplish familiar novelty within the confines of both physical artifacts (e.g., fixtures) and documents (e.g., visual merchandising manual). For example, Felicia (44) describes how her performance of the merchandising routine reflects her own style even while she is trying to make that style conform to patterns not only of novelty but also familiarity.

I kind of use a little bit of my style with what I think the store style is, whether to put a big necklace with a blouse or dress. I kinda just use my own personal—what I think would look good, and then I always add just a little bit more, because I think that they want the mannequins to look more flashy and to show off what they have, so where I probably would wear a scarf with something, I would always put a scarf on the mannequin just because I think that's more of the BoutiqueCo style.

Felicia suggests that her merchandising is constrained by the fixture that she must dress. She also interprets a sense of a "BoutiqueCo style" that shapes her merchandising. Yet, Felicia also points out that she tries to enact the routine by drawing from her own "style" combined with a "store style."

Penelope's (46) and Ali's (19) interpretations, respectively, help clarify the relationship between personalizing/depersonalizing and artifacts. Penelope says, "There are rules, but then you get to do your own way at the same time... You get to kind of put your own touch on it." Ali adds that this helps the organization achieve "an overall look, but it's not as specific." In other words, artifacts such as the visual merchandising manual provide guidelines, and fixtures serve as additional constraints. However, neither artifact is fully deterministic of how to enact the merchandising routine. Artifacts foster patterns of familiar novelty, because employees use these artifacts as a starting point to enact the routine, such as by following a common set of rules. Yet, employees also enact those rules differently based on their idiosyncratic backgrounds. As a result, when they enact the merchandising routine, employees produce patterns that are both familiar and

novel. As Nora (29) notes, the visual merchandising manual “give[s] you guidelines, but then you kind of take those guidelines and do as you please with them in a way.” Nora interprets that managers provide “hints and gives you things like suggestions,” but she takes

bits and pieces and you put it all together into one table, so obviously, I’m not going to have a table that looks exactly like [the guideline]... We display things, but we do differently, like there will be different items on different tables and things like that.

I observed firsthand the accomplishment of familiar novelty when several store employees worked together to merchandise a new store. My fieldnotes capture what unfolded as Tamara worked with an artifact, a trend alert that provided details about a specific type of look: “Tamara (27) did a Bohemian table. She was given a trend alert... But she can pick from the different trends and implement what she think works. Tamara asked what Jill (25) was doing on her table and then picked something she thought would work with it.” Tamara used artifacts created by the home office as a springboard for her own personalization of the merchandising routine (e.g., a Bohemian table concept described in a trend alert) but needed to make this fit with what Jill was doing on a related table so that their merchandising would create a novel but familiar look that meshed the idiosyncratic backgrounds of the two employees. The two employees were very mindful of how the other enacted the routine as their actions are interdependent with each other. When I asked Tamara about the restrictions in the visual merchandising manual, Jill stepped in to answer: “At BoutiqueCo, you have the best of both worlds. Some structure with a lot of creativity.”

From a routine dynamics perspective, even when employees depersonalize a routine they nonetheless inherently enact the routine in idiosyncratic ways. This is why no routine performance exactly matches previous routine performances. However, personalizing and depersonalizing call attention to the high degree of agency because employees make explicit choices about how much to intentionally intertwine their self with the routine (beyond the natural intertwinement that occurs from a routine dynamics perspective). Because of this high degree of agency, employees often need to exert a tremendous amount of cognitive effort to work from artifacts to enact the merchandising routine. Jocelyn (50) puts it, “It’s just a little bit more difficult to merchandise, because if you have a bunch of rules that you have to follow, you can’t do what you maybe want to do. For example, we couldn’t stack our merchandising items to put things higher up.” The responsibility falls on employees to use the artifacts as a foundation to accomplish both familiarity and novelty by personalizing the routine through explicitly interjecting their idiosyncratic backgrounds into a routine performance and by depersonalizing the routine through explicitly recognizing the limitations of that interjection.

### Auxiliary Routines

Auxiliary routines serve as a second way that routine dynamics enable employees to enact patterns of familiar novelty. Auxiliary routines shape a focal routine (in this case, the merchandising routine) and illustrate how a focal routine is embedded in a broader context (Howard-Grenville 2005, Rerup and Feldman 2011). I find two main auxiliary routines that shape the merchandising routine: hiring and feedback.

*Hiring Routine.* A dynamic ontology of routines takes seriously the routine actor, something that points to the importance of who specifically is performing a routine. Accordingly, BoutiqueCo managers make a concerted effort to use an auxiliary routine, the hiring routine, to select employees who exhibit certain characteristics conducive to enacting patterns of familiar novelty in the merchandising routine. For example, Alexis (3) is primarily responsible for staffing the field organization (i.e., employees who work in stores) and has helped hire many of BoutiqueCo’s employees. She emphasizes the importance of finding individuals capable of acting in novel ways within the guidelines (i.e., familiarity) of the organization.

You have to be visually strong to be able to set up your store within our visual guidelines. So, as I’m talking to candidates, if that scares them and if they say, “Oh, my gosh, I wouldn’t know what to do with the table because I don’t have that planogram with me,” they’re not a good fit for us, because that visual piece is a big part of their job... We can teach them HR, we can teach them recruiting, we can teach them operational pieces, but if you don’t have that visual foundation and that creativity you won’t be successful here, because that’s not something that comes overnight.

As Alexis points out, the hiring routine seeks to locate employees who can merchandise in novel ways that nonetheless adhere to the organization’s guidelines. She needs to locate employees who on one hand can interject themselves creatively into the routine while on the other hand recognize the depersonalizing of the routine. In other words, because a routine dynamics perspective takes the routine actor seriously, organizations need to pay attention to the people enacting the routine.

One of the challenges the organization has is that the broader stock of experienced retail employees work in environments that focus on enacting patterns of familiarity and not novelty or familiar novelty. Briana (7) observes, “There are people who would come from a Gap who would look at that and say, ‘Oh my goodness; I can’t handle that. I need to know that this shirt goes in this corner.’” As Briana suggests, retail employees often struggle to personalize a routine—they are used to the depersonalization of merchandising routines at other organizations where any deviation between an espoused routine and routine performance is considered wrong. Selecting routine actors

through hiring that exhibit characteristics conducive to only depersonalizing would challenge the enactment of familiar novelty, similar to how selecting actors who flaunted routines and simply acted with too much novelty would also challenge the enactment of familiar novelty.

To evaluate perspective employees' abilities to enact the merchandising routine in familiar and novel ways, BoutiqueCo screens them by presenting a counterfactual that strips away a key artifact at most retail organizations, a planogram:

How would you feel if your district manager came in tomorrow, threw the planograms away and said, "How would you like to merchandise this table?" And if they say, "Oh, I would love the opportunity to be able to do it myself, and I would really change it up," and so, depending on how they answer that, or if they say, "You know what? I wouldn't know what to do. My district manager would really have to do it for me," then that tells me that they could not pick up that piece of our business. (Alexis, 3)

Accordingly, managers use the hiring routine to shape the focal merchandising routine by placing actors with the characteristics that lend themselves to enacting familiar novelty. Hiring becomes especially important because the accomplishment of familiar novelty involves a different type of merchandising routine than employees usually have experience with outside of BoutiqueCo. This suggests the strong codependence of the two routines—if the hiring routine fails to select employees who can accomplish familiar novelty in merchandising, the organization may struggle to meet its objective of the ongoing accomplishment of recognizable creativity throughout the organization.

*Feedback Routine.* The feedback routine provides employees with information about their abstract understandings of and performances of the merchandising routine. It offers information to routine actors about the focal merchandising routine, tilting subsequent performances and abstract understandings toward familiar novelty. First I describe informal feedback that primarily takes place among employees. Afterward, I describe formal managerial feedback.

As a growing organization, BoutiqueCo opens up new locations on a regular basis. To help merchandise these new stores, managers frequently select existing employees from different stores to join new store opening teams to travel to opening locations. This groups employees, many who have never worked together before, in ways that allow them to discuss their understanding of the routine and observe each other enact the routine. Whereas informal feedback also occurs within a person's home store, the feedback is most pronounced when working with new employees who, because of their physical distance, are likely to have even greater differences in performances of the routine. Jessica (26) interprets informal feedback from new store openings as vital to familiar novel performances:

After you're working for the company for a year, you kind of get a little brain-fried on visuals. You kind of go, "Now what do I do? I've done that one three times. Now what do I do?" And working with different women from different areas of the United States, wherever that might be, they come in and say, "Oh, well, this is what I do at my store," and I take that away . . . . Putting together—it makes a difference—you know, a belt higher or lower, putting purses here or there, jewelry—every time I work with somebody, somebody else does the jewelry, and the jewelry table's just set up just a little bit different. And . . . I kind of go, "Okay, that would work at my store," and I take that back.

As Jessica explains, after a year with BoutiqueCo, she was burned out from the demands of having to repeatedly enact the merchandising routine in familiar and novel ways. The new store opening reinvigorates her performance of the routine by sparking different ideas, allowing her to select from other routine performances and use and shape them in her store. Willa (48) echoes this point, noting that, "I feel like I get more creative when I come back from an opening . . . because we're in our stores every day. We're not really traveling to stores all the time, so it's nice when you get out there and you get to see what other people are doing and share ideas, swap ideas." Willa also points out that in addition to receiving new ideas about how to enact the merchandising routine, she also shares her ideas. This allows employees, outside of direct managerial control, to exchange ideas and select from these ideas to make them fit for their own stores.

Rachel (28) offers another example of informal feedback from colleagues. She notes that "the exposure to new things means you're gonna come up with better ideas, and so I think you get stuck in a rut. You have the same clothes. You have the same things. And just working with people and talking to people will always give you new ideas and new perspectives and new ways to look at things." Rachel captures the challenges of familiar novelty as much of the materials she works with remain the same and the repetitive nature of her work gets her "stuck in a rut." Yet, through working with new colleagues she learns about "new ideas" and "new perspectives," allowing her to agentically integrate them with her own viewpoints and make them work at her store.

Whereas informal feedback can introduce new ways of understanding a routine, it can also promote familiarity by helping employees develop shared ostensive aspects of the routine with employees outside of their immediate stores. Returning to Rachel, she goes on to note: "I always like getting new ideas and doing things differently. [These visits are] a good opportunity to probably learn some new visual tips that they're doing, learn what we can do and can't do." As Rachel points out, she learns novel ways of enacting the routine even while she learns about the boundaries of that novelty. Thus, informal feedback helps

employees work out the boundaries of familiarity novelty. It allows them to adjust their performances of routines in ways that better accomplish novelty and familiarity, which in turn help produce and modify the ostensive aspects of the routine.

Employees also receive formal feedback from managers. This feedback provides a means for corporate managers to shape the way that employees understand and perform the merchandising routine. Familiar novelty depends on both patterns, but managers sometimes try to shape the outcome of these routines to make them either more familiar or novel. For example, in a memo to all store employees, corporate managers encourage employees to create “special” stores.

Don’t underestimate how challenging it is to be special. I think it is extremely difficult to be special. Years ago (pre-Internet) it was pretty easy for a retailer to be special with either a location or product selection. Not today. Location and products have both been commoditized. Don’t get me wrong; presenting a unique collection of products can make you special. It’s just not nearly as easy as it once was, and since very few retailers have any sort of exclusivity it’s vital to make the store experience itself special, too. How products are displayed makes them special.

The memo explicitly pushes employees to be special (i.e., novel) around providing unique merchandising (versus merchandise). The document then questions how employees at some stores recently fell short of these expectations, thereby trying to make more salient the importance of novelty.

You have to ask yourself, are you special enough? During the past week was your store experience truly special? Just as important, are you communicating that point of SPECIALty? Here’s a quick example. Last week many stores promoted jewelry, specifically charm bracelets. I’m sure your products were special, but was that special enough to get customers into the store? Some of those stores promoted a men’s night. Is that special enough? A few of those stores promoted their ability to create the perfect personalized charm bracelet. Now that’s special.

Another way corporate managers provide feedback is by sharing with employees how other employees performed the routine. For example, Veronica (33) recounts what unfolds when employees send pictures or descriptions of their routine performances of merchandising to the corporate office: “People send in stuff all the time. We’re always asking for more and more and more.” As Veronica reflects on this sharing, she concludes: “There are so many variations on a theme” consistent with “staying within the idea of the brand.” Veronica points out that there are boundaries to this novelty (i.e., familiarity from “staying within the brand”) but the corporate office encourages familiar novelty by sharing employees’ variable enactments of the routine. The sharing of information about routine enactments Veronica discusses provides a way of

spreading specific ideas about accomplishing familiar novelty. For example, Nora (29) recounts when she received feedback sent by managers about how employees at another store enacted the merchandising routine: “It really helps just to get outside information to have a mentor that’s sort of sending messages to the company that you can really relate to and that you can take her material and apply it to your store.” When asked whether she needed to follow this advice, Nora notes, “They are not mandatory, but they are definitely suggested and it’s worth a try . . . . You never know what is going to work for your stores and sometimes it won’t work for your particular customer . . . . We are in different areas and different areas supply different shoppers and different women looking for different things.” As Nora concludes, because of differences in her understanding of the “customer” not all ideas will necessarily work in every store.

Corporate managers also provide feedback to push employees whose routine performances have shifted too far away from the familiar. Veronica recounts that some routine enactments are too novel and need to be directed back toward the more familiar.

We have a guideline. We have a set of—I call them—you know when you’re bumper-bowling, so we don’t let you get in the gutter, because let’s say if you get in the gutter, you’re not representing the brand.

Veronica’s analogy to bumper bowling, whereby the “gutters” are filled with tubes to prevent the ball from straying into the gutter, suggests that employees can enact routines with novelty, providing they do not deviate too far from the familiar. This “familiar” includes adherence to the visual merchandising manual described above. Brianna echoes this point, noting: “There’s a lot of room, and at the same time fitting within the guidelines, obviously, that—because you can’t just let it be a free for all.” There are clear boundaries to merchandising—that is, there is a need for creative outcomes useful to the organization, resulting in the organization becoming recognizable. Lola (21) recounts an experience with a store manager who wandered too far from the familiar:

You have the manager who doesn’t like our way of doing things and they make it their own, so they go through and make it [Boutique named after that manager], so the follow up visit is very important . . . I call them and I [say] “. . . I really, really love this, however, this is what’s different.”

As Lola points out, whereas the organization encourages the infusion of the routine’s actor into the performance of the routine, too much of an infusion tilts too far from accomplishing familiar novelty.

I experienced similar routine feedback firsthand when I worked on enacting the merchandising routine for jewelry during a field visit. My fieldnotes capture my experience:

I did try a jewelry display—I had a skinny necklace with earrings. I was told by a [store employee] that, we don’t

do jewelry like that...there is the three necklace rule. I could do less necklaces if it was chunkier. I was slightly disappointed as I liked the creative paring of my jewelry and that my direction was rejected by the company. But I just tried a new way of exercising creativity, and I ended up “skirting” the rule by folding the necklace in half so it appeared that there were two necklaces, and then the [store employee] said she liked it.

As my actions and subsequent exchanges with the store employee suggest, we collectively worked out familiar novelty. At first, my enactment of the routine was something Veronica might label “in the gutter.” I adjusted my actions to become more familiar while retaining much of the novelty in my original routine performance. By folding the necklace in half I retained familiarity by having the appearance of more than one necklace while promoting novelty in how a necklace is displayed in contrast with the artifact.

### External Comparisons

I find that not only do other routines from the focal context (in this case, BoutiqueCo) shape the merchandising routine but also comparisons to other organizations shape the merchandising routine. This is consistent with the idea of a broader routine ecology (e.g., Birnholtz et al. 2007) in which aspects both inside and outside of the focal organization shape routine patterns and performances inside a focal organization. These external comparisons suggest a broader understanding of how contexts outside of their immediate work situation help employees understand the routines they enact inside their current work organizations.

Tracy (24) contrasts BoutiqueCo to other retailers to help her work out the meaning of the merchandising routine at BoutiqueCo.

Being able to make displays and make your—do your own mannequins, do your own tables—that sort of thing... At Loft or somewhere like that...there’s a certain structure that you follow when you do displays, when you do tables—that sort of thing—so everything looks the same across the country. Whereas here it’s gonna be different.

By comparing merchandising at BoutiqueCo relative to other organization, Tracy empowers herself to intertwine her idiosyncratic background into her enactment of the routine. At the same time, she anchors her comparison to another organization that emphasizes depersonalizing the routine. By using other organizations as a reference point, she might limit her own extent of agency as the standards for personalizing in externally comparable routines is low.

Lola (21) describes store manager responsibilities at BoutiqueCo similar to other retailers but also recognizes a different balance of personalizing and depersonalizing the merchandising routine.

When you get right down to it, it is basically the same job. You’re responsible for the sales within your store. You’re responsible for staffing. You’re responsible for your store to

be a success... When I came to BoutiqueCo...the merchandising [was] so different than any other company... Whereas at Claire’s they would hand you a planogram and they would say, make your store look like this. Here it was do whatever you can do to make your store pretty... Whereas over at the other company, all you did was look at a picture and copy it.

Although the job is similar, the enactment of routines between organizations is quite different. This suggests the need to understand not only the routine, but the personalizing and depersonalizing of the routine. For example, Lola draws a contrast to another retailer: “I’m sure if you walked into Banana Republic and they had tried something different that would not be okay, no matter how good it was working for that store.” This is because Lola interprets routines at other retailers as being primarily depersonalized—that is, as explicitly discouraging the routine actor to integrate her own self into the routine performance.

Katrina offers another example from the merchandising routine, contrasting her personalizing of the merchandising routine at BoutiqueCo with her former employers:

It’s actually really interesting for me to put my own input into how we display things and stuff like that. It just gives my personality out when I display a mannequin or when I set up a table. It shows my vision and how everybody here is affecting how other people look at how you wear and stuff like that... When I used to work at other places, the visuals in how you merchandise things are basically told to you how to do it.

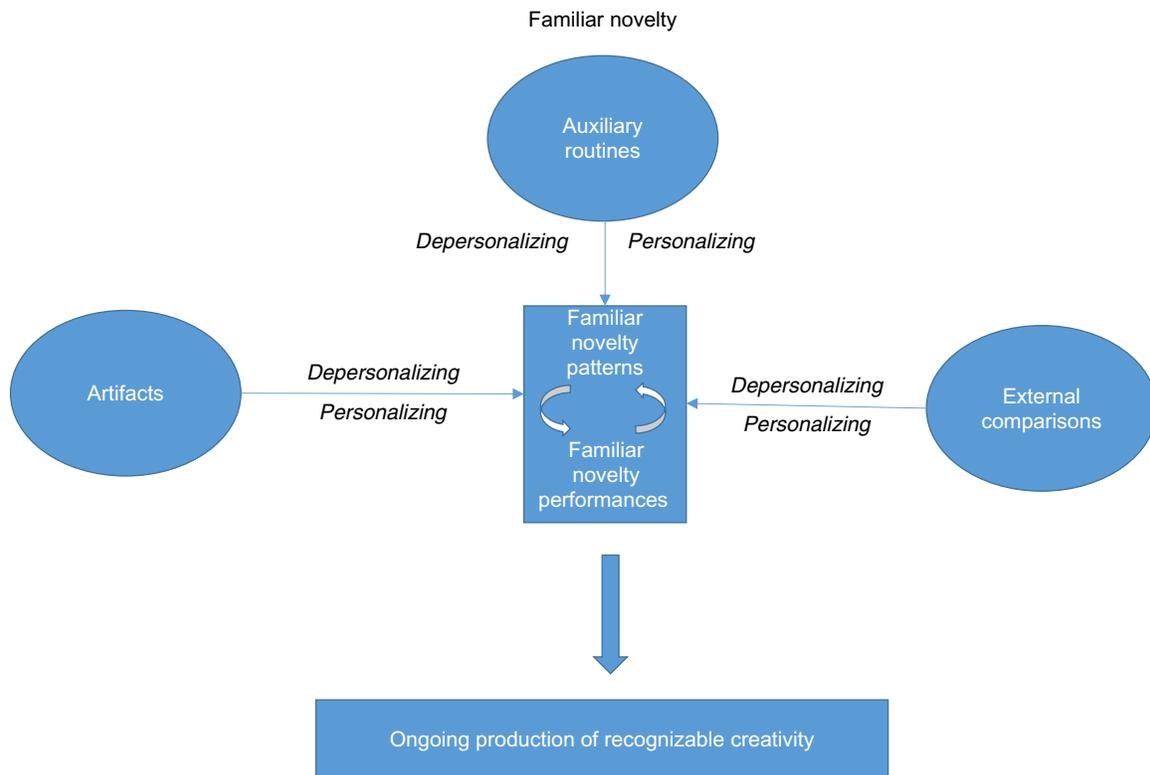
As Katrina points out, she understands the merchandising routine at BoutiqueCo, in part, based on her interpretations of a similar routine at another organization that primarily affords a depersonalization of routines. In contrast, at BoutiqueCo Katrina is able to more strongly use personalizing to integrate her own self with the enactment of the routine relative to other organizations.

### How Routine Dynamics Produce Recognizable Creativity

Figure 1 presents a model of how routine dynamics produce recognizable creativity on an ongoing basis. Familiar novelty refers to the enactment of the mutually constitutive patterns that produce ongoing creativity in recognizable ways. Consistent with a dynamic ontology of routines perspective, both ostensive (patterns) and performative (performances) aspects mutually constitute familiar novelty. I represent the recursive nature of familiar novelty patterns and performances using arrows connecting patterns and performances. The rest of the model seeks to represent how routine dynamics shape these patterns and performances.

Figure 1 illustrates how artifacts, auxiliary routines, and external comparisons enable organizational members to shape patterns and performances of familiar novelty.

Figure 1 (Color online) How Routine Dynamics Produce Recognizable Creativity



Personalizing emphasizes the strong, *explicit* intertwinement of the self with the routine. Individuals interpret that their idiosyncratic backgrounds (such as personalities or experiences) shape the completion of routine performances. Depersonalizing emphasizes the agentic choice not to *explicitly* intertwine the self with the routine. Whereas a routines dynamic perspective cannot separate the routine from its actors (Feldman 2000), personalizing and depersonalizing take this perspective a step further by positing an explicit managerial endorsement of that agency as well as the further agentic act of how the routine actor regulates the level of intertwinement between herself and the routine. Artifacts, auxiliary routines, and external comparisons provide three different venues for the routine actor to make explicit choices about personalizing and depersonalizing, something that produces both familiar and novel patterns and performances.

For artifacts, employees interpret formal documents and fixtures as incomplete. Employees then work out ways of enacting routines in familiar novel ways by *choosing* to combine their idiosyncratic backgrounds with the artifacts managers provide them. At the same time, employees *explicitly* recognize that the artifacts put constraints on this intertwinement (depersonalizing). By moving between their interpretation of artifacts and the ostensive and performative aspects of the routines, employees produce the complex pattern of familiar novelty that deftly melds the routine actor with the artifacts. Managers also play a role in helping produce the artifacts with which employees

interact. Accordingly, even though employees perform the routine, managers shape these performances through the production and selection of artifacts.

For auxiliary routines, other routines (in this case, the hiring and feedback routines) shape the focal routine (in this case, the merchandising routine). Since routines and their actors are inseparable (e.g., Feldman 2000), the hiring routine allows the organization to select actors who skillfully personalize and depersonalize the focal routine. Hiring employees who could not introduce their idiosyncrasies into the routine performance would be just as dangerous as hiring employees who performed a routine in ways that would create an unrecognizable organization (Birnholtz et al. 2007).

Whereas the effective selection of routine actors can lend itself to better achieving familiar novelty, inevitably routine actors will struggle with enacting such complex patterns. This is why a second auxiliary routine, feedback, serves an essential role by helping employees and managers collectively work out the meaning of familiar novelty based on informal discussions with colleagues and formal directives from managers. Feedback sets the boundaries for what degree of explicit intertwinement between self and routine the organization endorses. It allows employees to enact agency, and sometimes pushes them to be more agentic, but also helps managers retain a sense of control by shaping the performance of a routine as familiar novel if actors stray too far from the enactment of the complex pattern. Even as managers and other

employees provide feedback to employees, it is often those employees who need to take that feedback and adjust their behaviors, such as by selectively adopting or repurposing ideas from others and making them fit both for BoutiqueCo and their store.

For external comparisons, employees use their experiences outside of the focal organization to shape how they interpret and subsequently enact routines at their current work organization. For example, comparing the merchandising routine to other organizations allowed employees to both recognize the greater extent of personalizing they had but also anchored themselves to comparisons from these organizations that stressed depersonalizing. These external comparisons imbued the ostensive aspects at the focal context with important meanings that helped employees (and managers) work out the boundaries of their agency. By affirming what the routine was not (depersonalized merchandising), employees came to understand and enact the routine as involving higher degrees of personalizing compared to other contexts. By skillfully working out organizationally appropriate levels of personalizing and depersonalizing, employees further acted agentially by selectively drawing on other contexts beyond managerial control to understand and enact routines within their focal contexts.

Finally, by shaping familiar novelty, the organization regularly produces creative outcomes—novel behaviors upon which organizational members have collectively worked out the boundaries of—that nonetheless are familiar as BoutiqueCo. Whereas each store has a different look and feel, they all feel part of the same organization. This ongoing production of recognizable creativity comes from the production of complex patterns and corresponding performances that depend on the actor intentionally personalizing and depersonalizing the routine through interacting with artifacts, auxiliary routines, and external comparisons. Whereas the routine actor ultimately performs the routine to accomplish familiar novelty, and therefore helps generate ongoing recognizable creativity, the model suggests how a much wider routine ecosystem of artifacts, auxiliary routines, and external comparisons play an important role in producing these patterns and performances.

## Discussion

Using an in-depth case study, I theorized how routine dynamics manifested in artifacts, auxiliary routines, and external comparisons foster the ongoing production of recognizable creativity. I explained how routine actors explicitly work out and enact their agency in routine performances through personalizing and depersonalizing. This approach overcomes the dualism scholars frequently posit between routines and creativity as well as deepens scholarly research on how routine dynamics create complex patterns.

## Reconsidering the Dualism Between Routines and Creativity

Scholars commonly treat routines and creativity as a dualism. In setting up such a dualism, creativity scholars miss the opportunity to better understand, explain, and provide guidance for creative outcomes that come from routine work. In fact, creativity scholars posit that employees who follow routines rarely produce creative outcomes, despite being in the best position to detect problems and opportunities for improvement (Zhou and George 2003). In contrast, adopting a dynamic ontology of routines allows scholars to notice and elaborate on how routines and creativity are not inherently contradictory because creativity is endogenous to and an outcome of routine performances. Such a dynamic ontology of routines is consistent with other work in creativity, which recognizes that creative performances, although novel, also remain wedded to familiar conventions and traditions (Sawyer 2011).

Adopting a more dynamic routine ontology facilitates theory development about the coexistence of novelty and familiarity. Whereas most creativity scholars emphasize the need for divergent or breakthrough ideas (Audia and Goncalo 2007), I developed theory around how creative outcomes are just as dependent on the familiar. By acknowledging that creative performance and routine performance go hand in hand, this study calls attention to the wider range of actors involved in creative performances and suggests that creative performances may be a more common and more complex social accomplishment than scholars recognize. The routine dynamics I identified involve employees engaging in agentic (and at times, cognitively taxing) work to personalize and depersonalize in the context of artifacts, auxiliary routines, and external comparisons—concepts that managers sometimes also have a hand in influencing. This places a much greater emphasis on social context and interdependent action (Styhre 2006) than portraits of creativity as a primarily individual accomplishment.

Furthermore, the mechanisms I theorized (personalizing and depersonalizing) differ from the group-based mechanisms creativity scholars often reference—such as help seeking, help giving, reflective reframing, and reinforcing (Hargadon and Bechky 2006). Instead, I emphasized the routine as the locus of creative activity (versus the workgroup). This is an important development because it suggests a process that may transcend the group level and positions the routine as the level of analysis to explain creativity (Pentland and Feldman 2005). In this regard, my research invites creativity scholars to examine a level of analysis (routines) that they have largely overlooked. Whereas creativity scholars focus most of their attention on the individual level (George 2007, Shalley et al. 2004), some work examines more collective levels, such as groups (Hargadon and Sutton 1997, Hargadon and Bechky 2006) or organizations (Woodman et al. 1993). Yet, given

the scant research on more collective forms of creativity (Drazin et al. 1999), there is an opportunity to consider routines as an important level of analysis to explain how creative outcomes extend beyond individuals or even groups.

Finally, this study connects with research that has emphasized the role of autonomy and supervisory encouragement in facilitating creativity (Amabile 1988, 1996; Amabile et al. 1996, 2004). My findings that employees explicitly interpret their agency in personalizing routines, and that supervisors use auxiliary routines to advance this agency, coincide with how creativity scholars often view agency. However, under most formulations, routines and creativity are contradictory. By treating these concepts as a duality, it becomes possible to see that the agency routine dynamics provide employees also exist alongside the structuring of creativity. Employees explicitly recognize this structure through depersonalizing—they encounter constraints produced by abstract understandings and previous enactments of the routines as well as artifacts, auxiliary routines, and external comparisons. The ongoing production of recognizable creativity happens when the organization collectively balances personalizing and depersonalizing to accomplish both patterns (D’Adderio 2014). This suggests that structure is inherent to creativity as agency is inherent to routines.

### Implications for Routine Dynamics

This research also builds on work on routine dynamics in four primary ways. First, this study deepens scholarly views of the importance of agency and enactment, central parts of research on routine dynamics (Feldman 2000). Personalizing and depersonalizing explain how routine actors explicitly integrate (or chose not to integrate) their idiosyncratic backgrounds into routine performances. Whereas existing research, most notably by Salvato (2003, 2009), finds that routines can interact with external factors to foster creative outcomes or transform ambiguous stimuli into creative adaptations of baseline routines, I find that the generation of recognizable creative outcomes can come from the agentic decisions of routine actors to personalize and depersonalize routines. Previous research has found that routine actors are not interchangeable because “they bring with them particular understandings and motivations” (Parmigiani and Howard-Grenville 2011, p. 437). I build on this proposal by unpacking the intentional and explicit choice to fuse (or not fuse) a routine with an actor’s background. A routine dynamics perspective proposes that individuals will naturally fuse their backgrounds into routines (Feldman 2000), and other research suggests that organizational practices are recursively linked to employees’ identities (Michel 2014), thereby making the actor and routine/practice inseparable. I take this agency a step further, because routine actors also make *explicit choices* about whether to intentionally integrate or withhold their idiosyncratic backgrounds and experiences

from their understanding and enactment of routines. In fact, it is this demand to constantly create novel performances that nonetheless are familiar that some informants suggested psychologically taxed them—a far different portrait of routine actors who burn out because of monotony (Becker 2004).

Second, whereas focal routine actors, particularly employees, use personalizing and depersonalizing to accomplish familiar novelty, other individuals also play a central role in this process. Work has started to expand the shapers of routines beyond focal routine actors. For example, Turner and Rindova (2012) find that different patterns of the routine can emerge based on role differences, such as between the routine performer and recipient of that routine performance. Other work suggests the importance of context that extends beyond the focal routine, such as a wider variety of organizational performances by other organizational members (Feldman 2003). Feldman (2000; see also March and Olsen 1989) finds that routine actors do not confine themselves to a fixed repertoire when performing a routine but rather borrow from other organizational settings. My findings provide another avenue through which routine performances are shaped beyond the immediate routine actor and immediate organizational context. In my case, the data contain a litany of examples of individuals comparing routines to those of *other* organizations. As Anteby and Molnár (2012) point out, organizations can define their identities based on remembering to forget who they are not. In my case, employees repeatedly point out what their routines are not, based on different organizations that emphasize familiarity but not familiar novelty. This suggests that the examination of an organization’s routines may extend beyond the traditional boundaries of the firm and entail a wider “routine ecosystem” that consists of contexts and routine actors not only beyond the immediate routine context but also beyond the focal organizational context. This routine ecosystem can include other organizations in a focal firm’s industry or previous employers. It suggests that routine actors are mindful of routine patterns from other organizations and that these patterns may help them understand routines at their current organization. In this way, the life of routines may extend even further than scholars have realized, and the agency of employees might be even stronger because they shape routines at their focal organization by drawing from routines outside of their current work organization.

Third, I identified the central role of artifacts in shaping familiar novelty. Previous research suggests that sometimes artifacts codify and direct (D’Adderio 2003), and at other times seemingly have little impact on routine performances (Hales and Tidd 2009). My findings further develop our understanding of the complex relationships between artifacts and routines. On one hand, routine actors, interacting with artifacts, acknowledged the limitations on their agency and discretion to act. For example, employees

understood the ways in which the visual merchandising manual confined them to use certain fixtures and follow specific rules. Yet, routine actors also used the same artifacts to personalize and view themselves as agentic. Artifacts such as the visual merchandising manual helped routine actors personalize because these artifacts were necessarily incomplete representations of the routine, such as through only providing general guidelines (e.g., Turner and Rindova 2012). Furthermore, the artifacts, in comparison to typical artifacts in similar settings (e.g., planograms), allowed employees to make inter-organizational contrasts that further empowered them to personalize routines. In other words, employees understood artifacts in the context of extra-organizational artifacts—thereby also affirming the importance of a broader routine context that extends beyond a focal organization. More generally, my findings are consistent with recent research that posits that artifacts allow an organization to accomplish conflicting objectives (D’Adderio 2014).

Finally, I elaborated on the role of routine feedback that served as an auxiliary routine. Greve (2008) notes that whereas there is substantial research on organizational-level feedback, there is very little work on routine feedback. Pentland and Feldman (2008) suggest that actors performing “live” routines receive feedback that helps them build up and alter the ostensive aspects. However, what form this feedback takes remains less clear. Along these lines, my findings explain how feedback, from both colleagues and managers, shapes routine performances to help them enact seemingly contrasting objectives. Whereas research has long recognized that explicit errors may spark corrective behavior and adjustment to meeting goals (Locke and Latham 1990), the type of informal and formal feedback I find is not always based on errors but also can involve a more frequent effort by corporate managers and employees to collectively develop an understanding of a routine. This plays an important part in maintaining the duality of familiar novelty by facilitating adjustments to allow performances to enact both patterns.

### Transferability, Limitations, and Future Directions

Whereas the purpose of this study was to generate theory through detailed descriptions of the data and not offer generalizable conclusions, future research can build on this work to understand how the mechanisms and dynamics I theorized can explain routines in a variety of other settings. First, scholars are increasingly interested in contexts that require the ongoing production of creative outcomes, typified by creative organizations such as Pixar (Catmull 2014) and IDEO (Hargadon and Sutton 1997), who nonetheless retain a key goal of retaining their core identity. Routine dynamics offer one way of explaining the accomplishment of both objectives. More generally, a focus on how organizations can collectively produce recognizable creative outcomes through the duality of familiar novelty is something that is found not only

in the retail setting I examined but also in a variety of professional services firms. For example, Hargadon and Bechky (2006, p. 487) examined a diverse set of professional services firms where “arriving at a creative solution was not deviation from expected routine but rather was the expected routine.” The results of the current study explain how such creativity gets accomplished through routine dynamics themselves.

Whereas I focused on one routine at a single organization, the ability to accomplish collective creativity is often considered a critical but ill-understood process (Harvey 2014). Scholars have looked toward fostering a creative culture, training, and rewards to foster creativity in organizationally relevant ways (Woodman et al. 1993). However, one place scholars have largely not looked at (cf. Salvato 2003, 2009) is routines because, as argued throughout this paper, the dominant ontology treats creativity and routines as a dualism. Yet, shifting dualisms to dualities (Farjoun 2010) helps routine and creativity scholars dialogue much closer in ways that help them explain how organizations can achieve creative outcomes in ways that generate novelty while still retaining a connection to the familiar. It affirms the observation that there are patterns in action even if there is sufficient variation that makes each routine performance different (Birnholtz et al. 2007).

Beyond creative contexts, the findings from the current study also may have wider transferability. For example, my findings suggest how routines can help accomplish two seemingly contradictory objectives, something that other routines scholars have recently emphasized (D’Adderio 2014). Accomplishing such multidimensional performances helps explain routines’ central importance in organizations increasingly presented with apparently incommensurate demands (Smith and Lewis 2011).

In addition to examining my findings in other settings, there are several promising avenues for future research. First, whereas I emphasized one focal routine—merchandising—and two auxiliary routines (hiring and feedback), my analysis did not capture the full spectrum of routines at my field site. This may lead to an incomplete portrait of how routine dynamics shape creativity. Furthermore, other types of organizations might use routines for different priorities. My context primarily emphasized the importance of producing recognizable creativity. In contexts with other priorities, the mechanisms I theorized might operate differently.

Second, whereas the current research emphasized the cognitive and behavioral aspects of familiar novelty, there were also hints in the data about some of the emotional dimensions around familiar novelty, such as the psychologically taxing actions around constantly trying to perform routines in novel and familiar ways. This ties into research that has examined the role of emotions in creativity (Amabile et al. 2005, Fong 2006). My findings suggest some of the negative emotional consequences of having repeatedly to engage in creative

performances, thereby posing significant burdens for employees (Elsbach and Hargadon 2006). Future research can more systematically examine the psychological toll that comes from routine performances, not from repeatedly performing mundane tasks but from the psychologically taxing aspects of doing difficult, agentic work.

Although scholars typically view creativity and routines as opposing concepts, a routine dynamics perspective helps recast these concepts as a duality. Recognizing their mutual constitution, and theorizing the dynamics and mechanisms that explain their relationship, illustrates how creativity is as much a part of routines as routines are a part of creativity. It raises some exciting questions for both creativity and routines scholars to consider that holds the promise of drawing these often disparate literatures closer.

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### Appendix A: List of Interview Questions

#### Home Office Employees:

- Can you tell me what you do for BoutiqueCo?
- What did you expect your job to be like before you started? How has it actually been?

• Can you tell me what a model BoutiqueCo employee is? Is there more than one way to be a model employee?

- How do store employees learn about being a model BoutiqueCo employee?
- Who is [iconic symbol of BoutiqueCo]? How would you describe her?
  - How do you exemplify BoutiqueCo in your job and role?
  - BoutiqueCo has been opening up a lot of boutiques. Has this impacted your job?
    - Follow up: How have you had to adapt to this growth?

#### Store Employees:

- Can you tell me about what you do for BoutiqueCo?
- What did you expect your job to be like before you started? How has it actually been?

• How long have you worked in this position? What did you do before taking this position? Can you tell me about your other experience in retail?

- Can you tell me about what is a model BoutiqueCo employee?
  - How did you “learn the ropes” about working at BoutiqueCo?
  - How would you characterize your relationship with your co-workers?
    - Follow up: What was is like trying to be accepted by them when you first started?
  - Who is [iconic symbol of BoutiqueCo]? How would you describe her?
    - How would you describe your interaction and relationship with headquarters?
    - How do you go about the sales process?

- What are the different ways in which you exercise creativity or discretion in your job?
  - BoutiqueCo has been opening up a lot of boutiques. Has this impacted your job?
    - Follow up: How have you had to adapt to this growth?
  - What do you most enjoy about working here? What do you least enjoy about working here?
    - (store managers only): What practices do you use to help your employees “learn the ropes”?

\*Note: Because of the semi-structured nature of the protocol, the interview questions differed slightly among participants as the research progressed, but the protocol emphasized the above core questions.

### Endnotes

<sup>1</sup>All names of organizations and individuals are pseudonyms.

<sup>2</sup>The number in parentheses after an informant’s name refers to his or her informant number. Table 1 provides additional details about each informant.

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