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**The Digital Transformation of Marketer Identities
in Figured Worlds**

By

Kelly Bruce Dueck

**A Thesis Provided in Fulfilment of the Requirements for
the Degree of Doctor of Philosophy**

2022

Declaration

I declare that the contents of this thesis are solely my own except where otherwise cited in the body of the text. No part of this thesis has been submitted in fulfilment of any other degree or qualification. Ethics approval was obtained according to the Durham University research ethics policies and approval flowchart and was approved by my lead supervisor, Professor Nick Ellis and the Business School ethics review committee.

Abstract

The digital transformation of marketing has been ongoing for more than three decades but the breadth and depth of change in the last five years has been unprecedented. We know from extensive research on identities in organisations that change in work practices can prompt identity work, yet there has been relatively little prior research about marketer identities. Moreover, there has been even less research about marketer identities relating to digital transformation. This thesis addresses these gaps; however, it does so by looking at the intersection of marketer identities and digital transformation via a Pragmatist reading of Holland et al.'s (1998) concept of Figured Worlds, a social practice theory of identity with roots in Vygotsky, Bakhtin, Mead, and Bourdieu. This approach enabled the study of processes of transformation in relation to the various artefacts which make up figured worlds, such as vocabularies, practices, and materialities which come together to construct understandings about 'how things work' or what is considered 'normal' by the people who inhabit them. The main body of the thesis centres on an ethnographically-oriented case study of the marketing department of a large Canadian NGO (Canango) in the process of shifting from a traditional 'NGO helper' culture to a so-called 'Agile marketing' culture based on project management practices originating in software development that have been growing in popularity among practitioners. The thesis identifies a number of 'classes' of marketer identities: *managerially supplied*; *technologically afforded*; *socially afforded*; *emergent*; and, *performed* along with what each type enables one to do. Using ideas from Figured Worlds theory and multimodal discourse analysis, a heuristic framework is then developed made of the elements 'matter' (phenomena), 'meaning', *mediators*, 'me' (identity) and 'motion' (action) to study how these identities are used to accomplish contextual goals. This framework is then applied to study the way that three

people variously appropriated or resisted a particular supplied identity: the ‘Agile organiser’.

Finally the ideas developed through the first three phases of the thesis are applied in a final phase in which Canango begins using a new digital collaborative work platform. The study looks at the identity implications of this move, evidencing the ways in which the work platform serves as a ‘bridge’ between worlds and how such bridges may be used to change worlds and make new ones.

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The digital transformation of marketer identity in figured worlds

Chapter 1. Introduction

Prologue: Andy's changing world

Date: September, 2022

Andy Sellers made his way up the stairs to the second floor of Timewarp Publishing where he worked as director of audience development. After 10 years with the company he had seen a lot, but his memory of the dust-up between the art director and the lead user experience designer at yesterday's 'scrum' made him shiver. Ever since the vice president of marketing introduced a new approach to project management called 'Agile', things at Timewarp had taken on a decidedly different character. In fact, ever since the emergence of 'Web 2.0', it was less clear how marketing was supposed to happen. The world used to be simple. Develop a product based on the demographic segments in your database, create some direct mail promos and telemarketing scripts, then work the mailing lists and test until you found something that made money. Now it was all about code, or so it seemed. It was an analyst's dream, of course, and he understood that from his direct marketing background, but he could really see how the more traditional creatives in the department had struggled and that had boiled over in yesterday's meeting. On one side was Jane, the art director, who had a certain feeling she wanted to convey in her design to align with the brand across all the channels. On the other side was Curtis, the senior user experience (UX) designer, who insisted 'the data' showed that different users wanted different experiences, so there would have to be multiple visual themes served dynamically based on user behaviour.

Things got out of hand when Curtis said to Jane, ‘You just don’t understand how marketing is done now’, leading the copywriter and web developers at the meeting to stare at their smartphones more intensely than usual, before Jane shouted back, ‘Well, you guys (the entire IT department is male) don’t understand people!’ Then they both turned toward him and asked, ‘Well, what do YOU think?’ Andy wondered why they needed to have these cross-functional teams anyway. Why couldn’t he and Jane develop the marketing plans and then the programmers would just build the site the way they were told? Then he remembered the Wall Street Journal article by Marc Andreessen that the VP of marketing sent to everyone when he moved the company to Agile: ‘Why Software is Eating the World’ (Andreessen, 2011). The VP said they would have to become more like software developers... ‘Lean, quick and accountable’. Well, their world sure had changed. The only question was whether the rest of the company would realise it in time before they were all ‘disrupted’ out of a job. At least that’s what the VP said...

1.1 Worlds in flux

The above vignette, a fictionalised composite of several interactions from my own career as a marketing practitioner, illustrates a world in flux; a world characterised by multi-dimensional technological disruption; disruption which has led to an influx of new tools and techniques, new vocabulary, new ways of organising, and new ways of thinking about marketing. Most significantly, it has introduced new kinds of people to the practice of marketing, and it has affected people like ‘Andy’ who were already practising before everything changed with the arrival of ‘Web 2.0’ and the more recent AI-driven emergence of ‘Web 3.0’. In this thesis I investigate how marketing practitioners facing the digital transformation of their roles, ‘worlds’,

and identities deal with this disruption; how they respond to it, adapt to it and, in certain cases, instrumentalize it. Through the use of multiple qualitative methods, including ethnographic ways of writing (Humphreys & Watson, 2009), I hear from 28 marketing practitioners ranging from junior-level workers just entering the field, to executive level managers nearing the ends of their careers. I also draw upon approximately six months of observational fieldwork in the marketing department of a large Canadian NGO (Canango) still undergoing a shift in how it organises and practices marketing as it adopts ‘Agile’ project management frameworks originating in a still different, though increasingly related, world: the world of software development. I then present, analyse and theorise about the empirical material gathered in my interviews and fieldwork in a series of chapters which systematically work from an exploration of the wider issue of the marketer identity implications of the digitalization and dispersion of marketing work, down to a narrower focus on the effects of the introduction of a new Agile group collaboration platform at Canango; a shift which posed both identity threats and opportunities to the members of the marketing team.

As suggested by what I have written so far, a common thread running through the thesis is the idea of ‘identity work’, but from a slightly different perspective than in many prior studies. Brown defines identity work as ‘the many ways in which people create, adapt, signify, claim and reject identities from available resources’ (2017, p. 298); however, whereas most research on worker or marketer identities looks at the ways in which identities are constructed, I focus on how marketers *use* or instrumentalize identities to accomplish specific goals. Ultimately the focus is less on the initiation of identity work, than on the consequences and outcomes of identity work. Moreover, adopting a broadly sociocultural understanding of identity, including insights

borrowed from philosophical Pragmatism, cultural anthropology, and the emerging field of multimodality, I explore the topic of marketer identity work in the face of digitalization from the perspective of ‘Figured Worlds’ (Gee, 2014a; Holland et al., 1998).

Figured worlds are webs of actions, vocabulary, and other symbolic artefacts that frame what are considered to be ‘normal’ or ‘acceptable’ ways of thinking and behaving within the recognized context of that world (Gee, 2014; Holland et al., 1998). *(Note: I capitalise Figured Worlds when referring to the theory, and write in lowercase, i.e. ‘figured worlds’, when referring to figured worlds themselves).* Figured worlds supply artefacts that people use to make sense of their place in that world and to mediate action. These artefacts, or ‘cultural tools’, serve as ‘carriers of meaning’ (Wertsch, 1994, p. 204) and may have different meanings in different figured worlds, thus enabling certain outcomes and constraining others. Holland et al, (1998) illustrate this characteristic of artefacts with the example of poker chips, which have entirely different meanings in a casino (monetary value) and an Alcoholics Anonymous (AA) meeting (a symbol of how long one has been sober). If one were to show up at an AA meeting with a handful of poker chips hoping to exchange them for money they would have completely misread the meaning of poker chips in that world and ultimately fail in their goal.

In the case of my thesis, I dwell at length about the figured world of ‘Agile marketing’; a world built on an ethos of short project turnarounds, iteration, and transparency (some would say total surveillance) and formal tools and techniques such as ‘scrums’, ‘burndown charts’, ‘daily stand-ups’, and ways of physically arranging worker’s bodies in cross-functional, self-managed teams, which will all be detailed in coming chapters. Figured worlds thus provide the specific

mental and physical contexts in which situated identity work occurs and, in the case of this thesis, I also consider the ways in which identities are supplied, performed, appropriated and emerge at the intersection of several figured worlds at once: the world of ‘traditional’ marketing in a social services NGO in Canada, encountering the world of ‘Agile marketing’ as organised by a project manager, and which in turn evolved into ‘Agile marketing’ as practised ‘inside’ a collaboration software platform by a self-managed team.

I will have much more to say about figured worlds; however, for now it suffices to say that they are produced through the interactions and activities of the people who inhabit them (Urrieta, 2007) and therefore by studying identities through this lens, we become attuned to action as shaped by people *and* their world. This quality should help overcome what Watson (2006) identifies as the inherent limitations of either the dominant organisational *behaviour* or the ‘systems thinking’ perspectives taken on their own. ‘Figured worlds *happen* as social practice and in historical time’ (Holland et al., 1998, p. 55, emphasis in original). ‘Identities are thus formed in the processes of participating in activities organized by figured worlds’ (Urrieta, 2007, p. 109). Attending to figured worlds, such as digital marketing, and what happens in them, therefore enables one to understand how marketers make use of their various identities.

1.2. The digital transformation of marketing

Many articles have been written about the digital transformation of marketing practice. Most of them take an instrumental or functional approach and attempt to assist companies in being successful as they undergo change (E.g. Cui et al., 2021; Taiminen & Ranaweera, 2019; Wedel

& Kannan, 2016)). Relatively few, however, have considered who marketers are becoming as a result of this transformation (See Quinn, et al., 2016).

A generation ago, the role of a corporate marketing manager might have centred around tasks such as market research, strategizing, and traditional media planning. Today, those activities may still appear on the manager's agenda; however, the proliferation of new marketing technologies has disrupted traditional marketing channels and begun to raise questions about just what it is that marketers are supposed to do, and who should do it. Contemporary strategies such as 'mobile first' web development, 'content marketing', and offer integration with 'intelligent assistants', such as Amazon's 'Alexa', have spawned entirely new practices and discourses that have led to parts of the marketing function being subsumed by other departments and roles (Quinn et al, 2016). Meanwhile, as I discuss at greater length below, because the parameters within which marketers operate are increasingly defined by the structure of Internet marketing channels and cloud-based project management platforms, new actors have arisen to influence the shape of the figured world of digital marketing and what it is to 'be' a marketer within it.

On the surface, such change may seem unremarkable. After all, digitalization has occurred in almost every area of work so that essentially all work is now touched by digital technology, at least indirectly (Orlikowski & Scott, 2016); however, because of this digitalization and the ubiquity of the smartphone, marketers have little choice but to engage in at least some form of digital marketing practice, bringing us to 'a point in practice where digital marketing is just marketing, simply because almost all marketing activities a firm might consider now can have some kind of digital aspect' (Lamberton & Stephen, 2016. p. 168). Meanwhile, we know from

prior studies about identity work and the impact of information technology adoption on identities, that practices and discourses play a central role in how individuals construct and manage their identities (Belk, 2013; Carter, 2015; Plesnerand & Raviola, 2016; Stein et al, 2013; Stein et al, 2015; Watson, 2006; Whitley & Gal, 2014). For this reason it is not surprising for Quinn et al., citing Postman (2011), to ‘argue that it is not technology *per se* that is changing the way that marketing activities are conducted but how, where, and by whom these activities are being carried out. It is, therefore, the discourse surrounding technology and organizational change that is shaping these shifting functional responsibilities’ (2016, p. 2125), with more and more marketing work being conducted by people in other domains, such as accounting, operations, and especially IT (Blachetta and Kleinaltenkamp, 2019).

For example, already twenty years ago, in their study of cross-functional issues in an e-commerce implementation, Bennett & Koudelova (2002) indicated that because IT personnel had come to occupy influential positions in the firm through the importance of their work to operations, *including* marketing projects, the potential existed for people without a thorough grounding in marketing principles to be making important decisions related to marketing strategy and activity because of their high status in the firm. Similar issues persist today. For example, Viale et al., (2017) document a shift in the relative status of measurement expertise in a communications firm because of the use of advanced numerical techniques in designing consumer surveillance and control capabilities. Ultimately, Webster et al (2005) argue that rather than worrying about the relative status of a “marketing department” everyone should acknowledge that marketing is now dispersed, cross-functional and it is important that all of the necessary skills are embedded in the organisation or outsourced as needed. Marketing continues

to evolve with changing market and societal forces and may have a short-term or longer-term focus, depending on what is salient for management. Also the diffusion of functions and roles “is not necessarily bad as long as the skill sets are maintained somewhere in the organization” and it is clear about who is doing what and why (Webster et al, 2005, p. 43).

1.3 Marketer identity work

Of course whether one agrees with Webster and colleagues or not, these shifts in the distribution of marketing work have implications for the people doing the work, whether they are marketers who find themselves competing for status and job security with non-marketing personnel, or they are specialists from non-marketing functions who suddenly must make sense of marketing. The digital transformation of marketing transforms people, too. It should go without saying that people are more than their ‘function’. Yet in spite of this change and its potential to challenge marketer and non-marketer identities alike, there is relatively little research on identity work as performed by workers in marketing-related roles. Most papers consider identity in specific contexts such as advertising agencies. Lee and Lau (2019), for example, studied how increased use of social media by clients led advertising creative personnel to take on a wider range of tasks and adopt a “solution facilitator” role in addition to their creative role as they dealt with new demands brought on by the cross-functional nature of contemporary marketing. The result was a need to develop new skills outside their traditional specialist role, leading them to begin to ‘transcend digital/traditional distinctions and which required them to develop new skills and a wider set of professional relationships’ (Lee & Lau, 2018, p. 154). Lee and Lau’s (2018; 2019) observations are echoed by Patwardhan et al. who note that digitization has led to a need to transition from a ‘service’ to an ‘invention’ role (2019, p. 16). This shift has necessitated skills

in negotiating the boundaries between being visionary and being a “manager”; as well as improved collaboration skills (2019, pp. 12, 16).

As noted earlier, changes brought about by marketing digitalization has also led to the creation of completely new concurrent job functions, potentially creating internal conflict within existing roles. Zimand Sheiner and Earon (2019) note that media planning and management now involves a heavier use of data and analytics. This shift has required the adoption of a more technical mindset and the rise of new positions for experts in search engine optimization, as well as the need for new skills, such as web analytics, for existing managers.

Ellis and Ybema looked at identity work in marketing managers involved in inter-firm relationships within industrial supply chains and noticed a form of dynamic tension, with managers engaging in an ongoing process of boundary construction between various groups, ‘alternately constructing an inclusive or exclusive “self” vis-a-vis others then stretching or contracting relational boundaries as needed; a process [they] term “tensile discursive positioning”’ (Ellis & Ybema, 2010, pp. 279, 299). This process of tensile discursive positioning ultimately enabled the managers under study to negotiate complex relationships, firm interests, and competitive demands (Ellis & Ybema, 2010). Though not dealing explicitly with the implications of digital transformation, Ellis and Ybema’s theorising is echoed in the challenges faced by marketers negotiating how to straddle the boundaries of different figured worlds. This can be seen in a brief empirical example drawn from some of the primary research upon which this thesis is based.

As already mentioned, because the impact of digital transformation on marketer identities is under-researched, I undertook a pilot study (detailed in Chapter 4) to get a sense of the salient issues for practitioners experiencing the digitalization of marketing in a variety of organisations. Marketers painted a picture of a figured world of digitalized marketing composed of, among other things, greater pressure, structure, specialisation and accountability compared to an earlier world with ‘softer edges’. A web specialist working in a large agricultural machinery manufacturing company exemplified this view:

Researcher: Have you ever found yourself in situations where you feel like you’re more or less like a marketer as a result of these changes? Do you think your identity is changing in any way?

Web specialist: I personally think I can’t call myself a marketer until I can prove my numbers, especially digitally whereas like on traditional projects I mean yeah it’s a little fluffier likeokay We get this many views or we’re spending this much on these print ads or this trade show booth. But because they [senior executives] know that if those digital metrics exist and they can be shown then they should be shown. Like if we’re doing a print ad and we’re running it in a magazine, it’s like, well, this publication has this number of readers. They have a 60% readership or whatever. Great and we spent this much money. But if I do that online, it’s like how many people visit that page? What did people do on that page? How long were they on that page? How much do you spend? You know how many people saw it and clicked. How much did it cost per click? Like it’s you

can narrow it down, so those numbers should be there so I feel like I can't call myself a digital marketer until I know what my metrics are. Like what I should be proving and that is different from the other way, yeah.

This interview excerpt exemplifies a marketer discursively positioning herself between two worlds; at once feeling pressure to meet numbers at a much more granular level than 'the other way', while at the same time stating that the numbers 'should' be shown. Later in this thesis I will provide examples of other marketers engaging in similar negotiations as they live out different identities such as the 'agile organiser', the 'agile expert', the 'backdoor rebel' and the 'longsuffering marketer', among others, supplied either by executives and the larger figured world of general marketing, or emerging from local interactions. At this time, however, I will provide an overview of the thesis, outlining what I will present in each chapter, followed by a short discussion previewing the contributions to the field which will emerge from the thesis.

1.4 Thesis overview

My thesis introduces Holland et al.'s (1998) theory of Figured Worlds to the study of marketing practice. I investigate how marketers construct and instrumentalize situated identities within various worlds they inhabit and construct, including the worlds of 'non-profit marketing' and 'Agile marketing'; the latter, in turn, emerging from the world of 'Agile software development'. My study makes a contribution toward the understanding of how marketers shape, and are shaped by, these figured worlds which create the spaces within which practitioners recognize what is 'normal' but also what might be resisted. A focus on mediated action helps overcome the artificial divide between structure and agency in an analysis of how things work inside marketing organisations. My study also furthers our understanding of how marketers accomplish goals by

appropriating symbolic resources, *including* various socially recognized identities. This chapter provides a brief overview of the main areas of interest in the thesis and offers a quick summary of the general problem which inspired this research; introducing the wave of digital transformation upending the practice of marketing and serving as the catalyst for the identity work undertaken by the marketers in my study.

Chapter 2 Introduces the key theoretical and conceptual frameworks which inform the design of my research, including the framing of my research problems, the methods I used to gather and co-construct empirical material with participants, and the techniques I used to interpret and analyse this material. My approach is both sociocultural and practice theoretical in orientation and draws on compatible ideas from four key areas, namely: classical American Pragmatism (e.g. William James, John Dewey, G.H. Mead, and C.S. Peirce); Dorothy Holland and colleague's concept of Figured Worlds (Holland et al., 1998), already introduced; and, practical tools of analysis from two complementary streams within the developing field of multimodality, specifically Van Leuwen's (2008) social semiotic approach to multimodal discourse analysis which looks at how semiotic resources are produced and used, and Scollon's (2001) concept of mediated discourse analysis which takes action via mediational means as the fundamental unit of analysis, rather than 'texts' in the traditional sense. Altogether these streams of theory provide guiding principles for studying how people's various social identities are constructed and drawn upon as resources in the pursuit of situated goals.

Chapter 3 sets out the general methodological approach I take in this thesis which is 'Pragmatically-oriented' (Watson, 2011, p. 203). The nature of my study required that I 'get

close to the action' (Watson, 2011, p. 205) in order to figure out 'how things work' (Watson, 2011, p. 204). Watson sees ethnography not as a method per se, rather as a way of writing and orienting oneself in research that draws on multiple methods. Accordingly, I briefly discuss the more situated methods that I employed, including participant observation, semi-structured interviews, multimodal discourse analysis informed by Van Leeuwen (2008), and James Gee's (2014b) approach to critical discourse analysis, such as the use of his 'figured worlds tool' (Ch. 4.8). Given that multiple methods were used, I will also provide more detailed methodological information within each empirical chapter.

Chapter 4 discusses a pilot study I undertook to explore some of the areas related to the digital transformation of marketing, about which marketers at different levels of seniority, in a range of organisations, large and small, are attempting to make sense. The pilot study was based on semi-structured interviews with 17 marketing practitioners across eight organisations, both nonprofit and for-profit. Participants described a figured world of contemporary marketing composed of numerous discursive resources and symbolic artefacts including, among other things, 'metrics' and 'moments that matter', which speak to the quantification inherent in the digitalization of marketing. I used thematic analysis (Miles et al., 2020) and Gee's 'figured world tool' (2014b, Ch. 4.8) to analyse the interview data. The study also demonstrates how the field of software development, and indeed IT more generally, has colonised the vocabulary and figuration of the world of marketing.

Chapter 5 provides a detailed description of my main case site (Canango), establishing the boundaries of the study and introducing the main characters with whom I interacted during my

participant observation field-work and semi-structured interviews. Sociocultural and practise theoretical approaches to research emphasise the inclusion of detailed historical and cultural material as critical background for research because of the interconnected nature of mediators which populate, and are used by actors in every environment under study (Penuel & Wertsch, 1995; Scollon, 2001). The chapter paints a picture of an organisation undergoing significant cultural change and shifts in the various figured worlds both inhabited by, and under construction by, the workers at Canango, setting the stage for the investigation discussed in Chapter 6.

Chapter 6 Describes the multiplicity of marketers which are operative at Canango, identifying five main classes of identity: 1. managerially supplied; 2 emergent; 3. performed; 4. socially afforded; and 5. technologically afforded. I also introduce an additional concept of ‘captured identities’, a form of identity in which the individual finds they have lost some control to others through technological artefacts but which then recursively influences that individual’s identity work through their later interaction with a given technology. These various identities are then shown to afford or constrain different types of action within the case setting, leading to the research problem addressed in chapters 7 through 9: *‘how do marketers instrumentalise their identities in order to make things happen and accomplish their situated goals?’*

Chapter 7 draws on ideas from multimodal discourse analysis in addition to Figured Worlds theory to construct a heuristic framework for the analysis of identities in use. Ideas from social semiotics and mediated discourse analysis are used to illustrate a five-phase process of identity deployment through the use of mediational means beginning with the experience of a phenomena then moving through a recursive meaning-making cycle of sensemaking, appropriation of

cultural mediators, then using these mediators to index one's position within a figured world to construct an identity with its own affordances which enable appropriate action to be taken in a given context. The framework makes a contribution to studies in identity in organisations in that it offers a simple heuristic by which researchers may make comparisons of how identities are instrumentalized across multiple contexts, both inter- and intra-organisationally which answers calls for more multi-perspective approaches to identities scholarship (Brown, 2020).

Chapter 8 applies the heuristic framework developed in chapter 7 to study how a supplied identity is appropriated and used in unique ways by two marketers at Canango as part of the construction of the figured world of 'Agile marketing', as well as how an emergent identity is instrumentalized by a third employee in a different department to resist and circumvent the new figured world of Agile marketing. The chapter contributes to studies of identities in organisations by illustrating and explaining how marketers use their identities to make sense of and take action in response to the digital transformation of marketing in an NGO while offering a holistic view of this work, which is unusual in mainstream studies of marketing management which tend to study processes from a functionalist or cognitivist perspective.

Chapter 9 narrows the focus of the study further to the implementation at Canango of a new software platform, *Monday.com*, designed to facilitate collaboration in self-managed teams. The software was intended to allow Canango to hire two creative staff instead of a new project manager after the senior marketing project manager left for another organisation. Using a framework developed by Van Leeuwen (2008) and Djonov and Van Leeuwen (2018) I conduct a multi-modal cross comparison of three figured worlds to show how marketing practice changed

over time from before the introduction of ‘Agile marketing’ and then again with the introduction of ‘Agile marketing as mediated by Monday.com’. The analysis shows how affordances and structural artefacts within the figured world constructed through the use of the collaboration software enabled marketers to reclaim aspects of an earlier ‘NGO helper’ world which a new vice president of marketing had wished to discourage through the introduction of Agile marketing principles and methods. At the same time, the software structures a figured world which affords total surveillance by both managers and fellow marketing teammates; a feature which is nevertheless ‘sold’ by advocates as a beneficial and empowering transparency, serving as a reminder about the need to consider paradox as part of the practice of management and marketing. Moreover, the platform ‘condenses’ the figured worlds serving as an intermediary between the NGO helper world of the past and the Agile marketing world established by a project manager who has moved on, but aspects of whose identity have been captured by practice and ‘live on’ in software, ventriloquized and resemiotized by the platform and are made present to others on the team.

Chapter 10 draws together themes from the earlier chapters to produce a new perspective on the digital transformation of marketing; one that explores the phenomenon from the perspective of marketer identity work within figured worlds. The approach offers an alternative to typical functionalist and cognitivist approaches focused on performance optimization, to one which considers the human aspect of digitalization. Such an approach ultimately also has a bearing on performance, yet it does not assume that it is possible to systematically design and follow best practices based on law-like generalisations. While my conclusions are based on an interpretive

approach grounded in a Pragmatist view of a social practice theory of identity, I argue that they are more ‘realistic’, rather than ‘realist’; and ‘pragmatic’, instead of naively ‘practical’.

Epilogue I conclude by reintroducing our opening hero, the now nearly octogenarian Andy Sellers, as he navigates a world of ‘total marketing’ 20 years in the future and encounters some old friends along the way.

1.5 Contributions to research in marketing management

In this thesis I make a contribution to the study of marketing management by providing a critical understanding of the construction and performance of the figured world of Agile marketing in a large Canadian NGO. In so doing I extend our knowledge of marketer identity work by developing a framework for analysing and understanding how marketers not only construct situated identities but how they use those identities through the appropriation of symbolic mediators in order to achieve situated goals. This answers calls by scholars such as Brown (2019) and Caza et al. (2018) to further explore the outcome and effects of identity work in organisations. Additionally, there is currently a shortage of academic research on the management implications of Agile work processes for marketing, while at the same time the world of practice is quickly adopting these methods. This thesis contributes to the filling of that gap.

Further, heeding calls for identities scholarship to bring some order to the heterogenous literature on identities in organisations by synthesising ideas based on multiple perspectives, I draw on a range of compatible, broadly sociocultural, theoretical streams which find common ground in

attending to mediated action as part of the process of meaning making and the authoring of identities. Although Figured Worlds, social semiotics and mediated discourse analysis are quite well known in fields such as education, cultural anthropology, and applied linguistics they are less common in management studies. This is unfortunate given the popular understanding that management is about organising diverse resources in the service of taking purposeful action. Applying a sociocultural/social practise lens generally, and the idea of figured worlds in particular, offers a novel and practical perspective to the study of marketing management that should appeal to scholars and practitioners, alike. At a more situated level, this research also identifies a range of salient issues for marketing practitioners related to the digital transformation of marketing, while providing examples of how practitioners deploy various discursive and semiotic resources to make sense of related change.

Lastly, I undertake what appears to be the first marketing-related multimodal analysis of a cloud-based collaborative work software platform, a category of software that is rapidly growing in popularity across organisations as the use of Agile methods expands among self-managed teams in both the nonprofit and for-profit sectors.

Ultimately the research points to the presence of paradox as marketing teams simultaneously desire independence and embrace highly structured ways of working, echoing the views of thinkers such as Dewey and Mead who note the ability of human beings to be multifaceted and contradictory; at once rule makers and rule breakers, creatures of habit and transformation.

Chapter 2. Theory: frameworks and extensions

2.1 Introduction

As introduced in the first chapter, my research is situated in a world where marketing practice continues to undergo a profound digital transformation but is now more dispersed throughout organisations (Blachetta and Kleinaltenkamp, 2019). The result of this change, in both how marketing is done and who does the work, is that we are also seeing the potential for a transformation of marketer identities in the ‘master figured world’ of marketing, as well as other figured worlds with which it intertwines, such as IT. Consequently, my study looks at the sorts of identities which are constructed, instrumentalised (i.e. used to accomplish specific goals) and transformed within these worlds, attending to the mediational use of various linguistic, ideational and material artefacts as semiotic resources by the participants in the study. I thus draw on several theoretical traditions that are fundamentally ‘action oriented’ such as Pragmatism, Figured Worlds, and multimodal discourse analysis, as discussed in Chapter 1. At this stage, I provide an overview of the key elements of theory as they apply to this thesis. In later chapters I go into more specific detail about various aspects of theory as they are drawn upon to make sense of the empirical material that emerges as the project unfolds. This approach will help to lessen the risk of confusing the reader with an overabundance of unfamiliar terms from approaches to the study of identities that are still relatively little used in the management disciplines. I felt that it would be best to introduce more specialised terms in context so they would make more sense to the reader unfamiliar with the lenses through which I undertake my investigations.

The next section discusses the *sociocultural context* from which the project originated. I then discuss the major theme underpinning this thesis: identity work. I argue for a different way of understanding it to include *using* identities, in addition to working *on* identities. I justify this position in my subsequent sections on interpretive inquiry and the philosophical lenses through which I undertook this project: Pragmatism, and Figured Worlds theory. I finish with a *conclusion* that sets the stage for a discussion of *general methods* in the next chapter.

2.2 Origin story

This project originated from a need to understand what it means to be a marketer in a world still undergoing a wholesale digital transformation of marketing practice. My own experience in marketing began before the emergence of the world wide web and continues today where the Internet is ubiquitous in advanced economies, having found its way into a host of devices and physical environments. As already stated, in contrast to how marketing work is *done* today, there is relatively little research about what this means to the *people* who *do* the marketing work, whether they are working in official marketing capacities, or they are engaged in marketing-related activities along with other activities associated with their official roles. In my own case I have witnessed individuals in both camps, and more importantly I have seen and experienced the tensions that can emerge when different understandings about what marketing ‘is all about’ intersect in organisations with a need to generate and grow revenues. My own experience in practice has been largely quantitative, combining long-established techniques such as multivariate testing, k-means clustering, factor analysis, and logistic regression to identify market segments and predict customer behaviour. As useful as these techniques are in operationalizing marketing plans and optimising the performance of tactics in the field, I realised

that gaining an understanding of what the digital transformation of not only marketing work, but the very worlds within which marketing work occurs, would require an approach that takes into account the meaning making processes of marketing practitioners, since ultimately in order to understand how marketing is changing marketers today, one has to gain an understanding of not just who marketing workers ‘are’ but also who it is they are ‘becoming’, and *how*. Cross-sectional surveys would not be enough to get at the answers to these questions in a meaningful way. I would need to engage in an approach that got ‘close to the action’, so to speak (Watson, 2006), meaning that I would have to embed myself in the research context. This meant also that there was no way to objectively separate myself from the processes of social construction I was observing and that I would have to acknowledge that my presence in and of itself played some role in constructing the empirical material that would form the basis of this study. Therefore I would have to adopt an approach to research that acknowledges what should be obvious: that although sociomaterial phenomena really occur, these phenomena are never experienced without their being interpreted by the individuals who experience them, and whose behaviour in response would in turn be interpreted by me.

2.3 Identities and identity work

This thesis is fundamentally about a certain kind of identity work; however, it invites the reader to consider a different way of studying identity work than is the norm in management scholarship. Specifically, I focus on how people *use* identities to make things happen and get things done. Although there are a variety of definitions of identity work across the field, as part of their detailed literature review, Caza, Cough, & Puranik (2018) synthesised an extended definition:

‘Identity work in occupations and organizations consists of the cognitive, discursive, physical, and behavioral activities that individuals undertake with the goal of forming, repairing, maintaining, strengthening, revising, or rejecting collective, role, and personal self-meanings within the boundaries of their social contexts’ (p. 895).

Caza et al.’s definition covers a lot of territory; however, after surveying many recent literature reviews related to identity work and identification in management (e.g. Atewologun, Kutzer, Doldor, & Anderson, 2017; Brown 2015, 2017, 2019; Caza et al., 2018; Corlett, McInnes, Coupland, & Sheep, 2017; Knights & Clarke, 2017; Miscenko & Day, 2016) a conceptual gap is visible across the management identity work literature; namely, there is no mention of how people *use* identities as resources for accomplishing things, *other than* working *on* them. Looking at the most common ways that identity work has been studied in management, however, it is perhaps not hard to see why.

Management scholars have largely studied identity work through Role Theory/Identity Theory (RT/IT); Social Identity/Self Categorization Theory (SIT/SCT); Narrative Theory; Psychodynamic theories; and Dramaturgical/Symbolic approaches (Brown, 2021). Although these approaches have different points of emphasis, and represent a range of sometimes incompatible epistemological stances, Brown (2021) argues that, as researchers begin to more frequently draw on several approaches at once, the beginnings of what might be called a hybrid ‘identity work perspective’ has emerged (p. 9). Brown sees this perspective as grounded in five broad assumptions:

‘(i) selves are reflexive and identities actively worked on, both in soliloquy and social interaction; (ii) identities are multiple, fluid and rarely fully coherent; (iii) identities are constructed within relations of power; (iv) identities are not helpfully described as either positive or authentic; and (v) identities are both interesting per se and integral to processes of organizing’ (p. 1).

One of the reasons Brown (2021) feels it is worth acknowledging an identity work perspective, as opposed to another theory, is that doing so may help avoid a further siloing and fragmentation of the scholarship on identity work (Note: as Brown explains, a perspective is more broad than a theory and may allow for a certain amount of paradigmatic incommensurability). Brown calls out the SIT community in particular for a lack of engagement with other streams of research on identities (2021). Although I agree with Brown about the value of framing research on identity work in terms of an identity work perspective, I think there is still room to embrace Knights’ and Clarke’s (2017) call to incorporate parallel approaches from outside the field in an effort to open up new avenues. This is what I do in this thesis, drawing on a blend of Figured Worlds theory and selected practical elements of multimodal discourse analysis (which I discuss in Chapter 7 as I develop my heuristic framework for studying how identities are used to accomplish situated goals). Moreover in adopting an overall Pragmatist onto-epistemology (see below), I benefit from a common frame of reference that, in general, justifies my hybrid style (See Figure 7-1) as I shall discuss later.

I will of course detail and apply my own understanding of identities and identity work as I work through each chapter; however, first I wish to briefly review some of the more common

approaches that have been used to study and theorise about identity work in management. I will note both their main contributions and disadvantages, and why there is value in adding ideas from outside management that some might argue only serve to further muddy the waters.

2.3.1 Current approaches to researching identity work in management

In order to preserve space to allow for my empirical chapters I will not provide an exhaustive review of current approaches to identity work research; instead, I refer interested readers to any of the excellent literature reviews mentioned earlier (e.g. Atewologun et al., 2017; Brown 2015, 2017, 2019; Caza et al., 2018; Corlett et al., 2017; Knights & Clarke, 2018; Miscenko & Day, 2016). For the purposes of this chapter I draw mainly on Brown (2021) and Caza et al. (2018) which provide a good general overview of identity work literature in management fields. To put this chapter in context, however, here is a (very) brief introduction to each of the leading approaches identified by Brown (2021):

2.3.1.1 Role Theory/Identity Theory (RT/IT)

According to Brown (2021) RT/IT has its antecedents in the work of Simmel and Mead and more recently, according to Caza, et al., (2018) with Stryker and Serpe, who have linkages to symbolic interactionism, itself based on a highly-selective reading of Mead (Simpson, 2009). The RT/IT approach has shown how people work to change their identity to either fit the roles they take or to re-imagine those roles as they work through what they think others expect of them (Caza et al., 2018). RT/IT has been criticised that its heavy focus on roles may miss the importance of other identity foci such as race, gender or nationality (Brown, 2021), which parallels what has

been seen as an overemphasis on the local at the expense of the social and historical within symbolic interactionism more generally (e.g. Knights & Clarke, 2017; Ritzer & Stepnisky, 2022; Simpson, 2009).

2.3.1.2 Social Identity/Self Categorization Theory (SIT/SCT)

SIT/SCT is cognitivist, grounded in social psychology, and sees identity as ‘refer[ing] to self-categorized group memberships associated with prototypes that specify beliefs, attitudes and behaviours’ (Brown, 2021, p. 4). Caza et al. (2018) note that the SIT/SCT approach has contributed to an understanding that people are motivated to engage in identity work in order to stand out or fit in ‘[w]hen collective meanings are changed or challenged [and] when ingroup/outgroup distinctions become salient’ (p. 896). This approach has been criticised, however, for an overemphasis on group identity and a de-emphasis on ‘agency and personal identity’ (Brown, 2021, p. 4) as well as a lack of engagement with other theoretical approaches (Brown, 2021).

2.3.1.3 Narrative Theory

According to Caza et al. (2018), narrative identity theory sees identity work as a process of ‘[creating] and updating stories that draw on personal histories and available discourses’ (p. 896). Narrative theory has shown how in the face of ambiguity and change people will engage in identity work in an effort to maintain coherent and plausible identities (Caza et al., 2018). Brown (2021) states that the narrative approach to studying identities has been criticised for an overemphasis on ‘narratives [and] discourse’ (p. 4) at the expense of other ways of engaging in identity work.

2.3.1.4 Psychodynamic Theories

The psychodynamic approach to studying identity work in organisations has its origins in Freud in the 1930s and Lacan in the 1970s (Brown, 2021). This approach studies identity by analysing discourse for evidence of ‘psychodynamic phenomena’ such as the rationalisation or projection of what are ultimately seen to be fictional and illusory fantasies about what people think are stable and reliable identities (Brown, 2021, p. 4.) Brown further notes that the main criticisms levelled at the psychodynamic approach include the way it ‘downplays agency’; the difficulty involved in ‘accessing unconscious states’; and, the lack of precision in analyses (2021, p. 4).

2.3.1.5 Dramatistic/Dramaturgical and Symbolic Approaches

Rooted in the work of Kenneth Burke and Erving Goffman, the dramatistic/dramaturgical and symbolic approach to studying identities sees identity as like a performance on a stage, using various symbols as props (Brown, 2021). Brown claims that a weakness of such an approach lies with ‘inherent difficulties associated with collecting and analysing dramaturgical and symbolic data’ resulting in this approach often being combined with other traditions such as narrative theory in order to produce a more complete analysis (2021, p. 7).

Although it is not my goal in this thesis to challenge the knowledge claims made by researchers who have used the above approaches, I do take note of the common criticisms levelled against them. It is my hope that the work that follows may enable researchers to study identity work in such a way as to avoid, or at least reduce the chances of, encountering the problems that Brown (2021) identifies. My strategy has essentially been to follow one way that Corlett et al. (2017)

suggest for dealing with the seeming incompatibilities among the many ways of understanding identities, namely the ‘get above (or below) it’ strategy (p. 269); to, in other words, transcend the differences or unify them. My approach does both, placing the focus on practice but in a way that integrates the symbolic with the discursive, without denying the validity of existing streams of theory.

I shall next go into more detail about the theoretical perspectives that I apply in this thesis. As already noted I use a hybrid strategy in assembling my various research strategies, which I justify via my reading of certain principles within philosophical Pragmatism, in particular its interpretive aspects.

2.4 Interpretive research

‘Interpretive approaches to social inquiry are generally based on the idea that social action can only be interpreted by contextualizing it in the cultural system of concepts, rules, conventions, and beliefs that give meaning to that action’ (Moisander, Närvänen & Valtonen, 2020, Ch. 15.2 para. 2). Unlike the natural sciences which study natural phenomena which exist outside of human design and which possess characteristics amenable to theory building that develops law like generalisations about how the natural order functions, social science focuses on human constructions and the effects they produce. These constructions are subject to change, contestation and reinvention. Their meanings differ contextually and thus their ‘truth’ is open to debate. Interpretive research acknowledges these characteristics of social worlds and seeks to understand what social phenomena mean to the people who experience them, and what the consequences and effects of these meanings might be. As Yanow writes, ‘Our institutions, our

policies, our language, our ceremonies are human creations, not objects independent of us. And so a human (or social) science needs to be able to address what is meaningful to people in the social situation under study. It is this focus on meaning, and the implications of that focus, that the various interpretive methods share' (2015, p. 9).

The approach to interpretive science adopted in this study borrows from several traditions but especially Pragmatism, including the Pragmatism of John Dewey, who developed ideas about 'inquiry', Charles Peirce who articulated concepts such as mediation and abduction (concepts to which I shall return), and William James who articulated the implications of Peirce's original 'Pragmatist maxim' (James, 1907) which will be discussed in more detail in further sections. Although there are a number of different approaches or emphases among Pragmatist scholars, a more or less unified outlook can be built out of a number of points of agreement. For example, as the name suggests, pragmatists tend to be first of all interested in the outcomes or effects of phenomena such as human actions and how they are interpreted by people, rather than objectivist notions of universal truths or ultimate reality. Instead, truth for pragmatists is contextual and inextricably tied to whether an understanding is able to serve as a tool that people in a given world can use to successfully live in that world. In other words, although pragmatists reject the idea that there is one single objective social truth for every situation, some claims or ideas of what the truth is in a given context *are* better than others. Importantly, ideas of what are true are not static and, over time, through inquiry, we arrive at better and better versions of the truth as we develop more useful and successful interpretations of what is going on. 'Therefore, the aim of truth is not to correspond to the world but to anticipate and shape future experience, taking as starting point day-to-day experiences' (Rumens & Kelemen, 2016, Ch. 1 para. 18). This

anticipatory ethos leads to a focus on experience (and consequently, practices, activities and action) as the main unit of analysis in ‘pragmatically oriented’ (Watson, 2017) research. There is no separation between experience and one’s thoughts about it. For Pragmatists, thought and action are part of a continuity between one’s interaction with the environment and one’s thought processes about it. Knowledge is thus embodied and subject to modification as we experience the world in new and ever changing ways (James, 1890 in Rumens & Kelemen, 2016). This embodied knowledge, subject to modification through the effects of experience, further enables us to conceive of multiple futures and to act in response to phenomena in such a way as to align with a desired imagined future (Brinkman, 2012; Rumens & Kelemen, 2016). Although humans respond to situations through habit (See Lorino, 2018 for a detailed discussion of the Pragmatist understanding of habit) we also engage in a more deliberative process which Dewey called ‘inquiry’.

2.4.1 Dewey’s concept of the ‘indeterminate situation’ and implications for inquiry

Dewey’s conception of inquiry is a key pillar of Pragmatist understandings of science. One of its distinctive qualities is its rejection of the idea that scientific knowledge and ordinary human knowledge are fundamentally different (Brinkmann, 2012). The acquisition of either occurs through human activity and in neither case does it magically appear ready made to the passive objective observer. Knowledge arises through experience and need. As we proceed through life we encounter what Dewey calls ‘indeterminate situations’ (2018/1938, Ch. VI) which challenge some aspect of our particular world and lead to disquiet. We have a problem and it needs to be solved in order to move forward. Whether as virologists needing to understand why a new Covid-19 variant is more contagious than an earlier one, or as marketers who need to figure out

why sales of a kitchen gadget have suddenly gone into sharp decline compared to last quarter, we encounter situations that make us wonder *who, what, where, when, why, or how*. These questions kickstart a thought process that involves turning around possible reasons in our minds and weighing them against available experiential evidence within the context of the worlds of which we are a part, rather than through disconnected abstract reasoning alone (Brinkman, 2012; Morgan, 2014) then *doing* something about it to see if we have a solution that puts our minds at ease. Importantly for Dewey, '[t]he [...] antecedent conditions of an unsettled situation are involved in that state of imbalance in organic environmental interactions [...] Restoration of integration can be affected [...] only by operations which actually modify existing conditions, not by merely "mental" processes' (Dewey, 2018/1938, Ch. VI). In other words as situations arise that cause disquiet and lead to identity work, one cannot deal with the situation simply by 'believing', or 'thinking positively' or 'wishing away' the problem; one must act, thereby changing the situation in some way. As the situation is modified, change will be more or less satisfactory and over time, it is hoped, one will move toward progressively better solutions and a satisfactory resolution. In the case of this thesis we will see examples of indeterminate situations, primarily in Chapters 6, 8 and 9; the key situation being Robin and Ted taking action to change the work culture in the marketing department from what I call the 'NGO helper' world (described in detail in Chapters 6 and 8) to the 'Agile marketing' world.

Knowledge is thus intimately tied to action, and its consequences, as there is the expectation that 'solving the puzzle' will affect our lives and impact the ideas we have about how things work, our theories serving as tools of inquiry which are validated through their performance in helping us live our lives successfully (Brinkman, 2012; Watson, 2017).

This ongoing iterative process of turning around possible explanations in our minds and evaluating them in light of experience is related to an interpretive logic of inquiry known as abduction. Abduction as a formal approach to reasoning was most famously articulated by the American philosopher Charles Pierce and differs from the more often cited deductive and inductive logics. Induction begins with specific experience and attempts to reason how situated empirical facts *may* be generally true. Deductive logic, on the other hand, starts with general theories about the world and develops specific hypotheses to test their validity. Both of these logics make the assumption that the researcher is dealing with either a stable set of cases which can be used to systematically construct a testable general theory or that we have a concrete theory that is available for testing; however, in day to day experience things are far less tidy and deduction and induction do not necessarily serve our needs, given the uncertainty of lived experience (Brinkmann, 2012). Instead, abduction is the natural process we follow as we attempt to make sense of the world and its effects and, according to Pierce, the only way we really generate new scientific theories in the first place (Simpson, 2018). Abduction enables us to ask certain kinds of questions and answer them in creative ways; it essentially involves considering the problem or phenomenon that was experienced which challenges existing ideas about how things work, then imagining what (as yet) unobserved phenomena *would be the case* in order for one's experience to make sense, like a detective such as Sherlock Holmes (Brinkmann, 2012; Simpson, 2018). Importantly, there is no guarantee that what *might* be the case is 'true', only that for the time being we make relatively useful 'warranted assertions' (Dewey, 1938, Ch. 1) about answers until we have evidence to the contrary. For example, we sit down in the nave of a large cathedral taking note of several parishioners quietly kneeling in prayer. Suddenly a middle aged

woman wearing so-called ‘business casual’ attire emerges from the chancel and sprints down the centre aisle and out the front doors, behaviour which is quite unexpected in this context. We conjecture, based on her appearance, that she might be a physician who has been called to attend to an emergency outside (afterall, the doctors *we* have visited at their clinics have dressed like her). Moments later two uniformed police officers also emerge from the chancel and sprint out after the woman. We now interpret the situation quite differently, thinking that with the police now present there must be a serious medical emergency in play. On the other hand, given the location, maybe the police are actually in pursuit of the woman because she is a well-dressed thief who has stolen a valuable religious artefact. We are now curious enough to get up and follow the police, to find that the woman is standing next to two other police officers who have pinned a young man to the ground and the woman is wearing a police badge on her hip. Presented with this information we now conclude that the woman is a police detective supervising an arrest and the police whom we followed out of the cathedral were part of a team of officers looking for the actual suspect. This example illustrates the process of abduction involving a phenomena *which we interpret based on prior experience and situationally available information* (we may have seen movies where doctors rush to attend to patients, or police sprint through unexpected places in pursuit of suspects) and which we then modify *as new information presents itself* to align with what must be the case in order for a situation to be true, and better explain the phenomena.

Such an abductive logic of inquiry underpinned my investigation of the digital transformation of marketer identities, both methodologically (discussed further in Chapter 3) and in terms of how I interpreted the actions and phenomena I observed during my field work. I now turn to the next

theoretical concept, broadly shared by Pragmatism and the other lenses through which I carry out my investigation, namely the concept of *mediated action*.

2.4.2 Mediated action: things don't 'just' happen

In this thesis I adopt the stance that discourse is inextricably tied to action, specifically *mediated action*, rather than seeing discourse only in the abstract as 'text'. Following Scollon, 'the focus is on social actors as they are acting because these are the moments in social life when the Discourses in which we are interested are instantiated in the social world as social action, not simply as material objects' (2001, Ch. 1, Para. 15). Specifically, people's thoughts and actions are mediated by various cultural tools, whether material tools such as work equipment or non-material tools, such as ideas, words, routines (Wertsch, 1991) and, importantly for this study, identities (Jones, 2016). In other words, rather than only considering discourse *as* action, the perspective here looks at discourse *in* action (Scollon, 2001). That is to ask, what discourses appear embedded within the various cultural tools which mediate our actions and tie them to culture? This perspective has its roots in the work of Lev Vygotsky, originator of what he called cultural historical psychology, and Mikhail Bakhtin, a philosopher and literary critic.

Writing, as they did, in Russia during Soviet times, Vygotsky and Bakhtin saw social life through a lens that de-emphasized individualistic perspectives of the person and instead understood social relations as interwoven with each other as part of a historical trajectory. Vygotsky's area of focus was developmental psychology, and he argued from evidence that learning does not happen individually in one's mind solely through cognitive processes, 'but rather [is] a social activity mediated through the various tools which our cultures make available to us' (Jones, 2016, Ch. 2,

Para. 54). Meanwhile, one of Bakhtin's key contributions was to articulate the related concepts of *heteroglossia* and *dialogism* which further tie to the idea of *voice* or a consideration of who the 'background' speaker is in any conversation (Jones, 2016). Heteroglossia recognizes that any utterance is constructed from innumerable prior utterances and words as used by people who came before. We all use words, phrases and various constructions as we have learned to appropriate them in our individual development. We might assemble them in unique ways but never entirely. Our use of language is thus 'polyvocal' and the voices of others continue to speak through us, a concept that has been translated as 'ventriloquation' (Wertsch, 1991) and we thus enter into a dialog with those who have spoken before and those around us about what is meant when we say it. I will return to this concept of ventriloquation again in Chapter 9, particularly how it relates to what I term 'captured identities'; however, for now, it is important to realise that the ideas of Bakhtin and Vygotsky help us move away from the notion that thought and language occur only inside our own heads, and instead realise that they are social, extending beyond our individual personhood.

Given what we might call the distributed nature of communication and thought, the concept of mediation that follows from this understanding becomes of paramount importance when exploring the social world, for not only are words and utterances connected with each other through history and use but so are the mediational means or cultural tools that we use as we act in the world. These tools are inventions and like all inventions both afford certain actions and constrain others, for example binoculars let one see distant objects clearly but make nearby objects blurry. Moreover, the affordances and constraints are contingent and depend on the context. Using binoculars in a theatre to look at a performer on stage might be socially

acceptable but using them to look at one's fellow passengers on a subway car is likely to cause trouble. Mediators are not merely carriers of meaning but they also make meaning, and their affordances and constraints variously limit and enable different social outcomes, depending on the context. Moreover, according to some thinkers such as Cooren, reality is literally *constituted* communicatively (2012).

Undertaking a unique reading of Peirce, Cooren writes:

‘Loved ones are constituted through the photographs that make them appear to you on your desk [...] a disease is constituted through the symptoms that reveal it to the physicians [...] It does not mean, of course, that these photographs [and] symptoms [...] respectively exhaust the modes of being [...] It means that they just are one of their embodiments or materializations among many others, that is, one of the ways by which they happen to exist’ (Cooren, 2020, p. 11).

Moreover, as Cooren goes on to explain, the realisation of things in the world proceeds by a matter of degree or as Peirce puts it, ‘being is a matter of more or less’ (1983/1998 in Cooren, 2020, p. 13). As we shall see later, the more artefacts which ‘figure’ a figured world are present in a situation, the greater the realisation of that figured world and the identities to which they give rise.

I will go into Figured Worlds theory in greater detail later in this chapter; however, first I will return to Pragmatism which I introduced above, because it is the lens through which I look at Figured Worlds and apply it in my study.

2.4.3 The Pragmatist way of looking at things

The approach to interpretive research that I take owes most of its position to the ideas of the classical Pragmatists; however, a Pragmatist stance also affords one complementary ways to think about meaning and symbolic action which lie at the heart of Figured Worlds theory and the approaches to multimodal discourse analysis I apply in this thesis. I will therefore briefly discuss Pragmatism on its own before delving into Figured Worlds theory in greater detail.

As a philosophical perspective, Pragmatism comprises several divergent, but related, streams of theorising originating most notably in the late nineteenth and early twentieth century work of the Americans Charles S. Peirce, William James, George Herbert Mead and John Dewey. James, who popularised Pragmatist ideas first articulated by Peirce, explains the core idea of Pragmatism as follows: ‘The pragmatic method [...] is to try to interpret each notion by tracing its respective practical consequences. What difference would it practically make to anyone if this notion rather than that notion were true’ (1907, 42)? Peirce, for his part, argued ‘that the meaning of actions and choices taken in the present lies in their conceivable future consequences’ (Simpson & den Hond, 2022, p). Taking a slightly different angle, Legg & Hookway suggest that ‘Pragmatism is a philosophical tradition that – very broadly – understands knowing the world as inseparable from agency within it’ (2021, NP). The consequence of these three views, for my needs, is that they empower me to draw on the aspects of Figured Worlds theory and multimodal discourse analysis that are in essential agreement, namely their interest in what people do with ‘things’, and ignore aspects that may diverge but are not practically relevant to my goals. It also means that, although the frame of reference I use throughout my investigations

is that of Figured Worlds theory, I look at Figured Worlds very much through the lens of Pragmatism and will draw on Pragmatist ideas throughout this thesis to make various points.

2.4.3.1 Pragmatist views of meaning and action

In order to understand what the world means to people and how it works, one must observe and analyse action as it unfolds while attending to how people inquire or make sense of their social experiences and the significant symbols which weave them together (Simpson & den Hond, 2022). Social phenomena do not ‘just happen’; they are inseparable from the sociocultural histories out of which they emerge, as well as the futures they are informing in the present. Social phenomena are not discrete and fully isolatable. Things happen but they are informed by and inform different people differently as they *become*, each in their own way, in response to the phenomena they encounter. Viewed through the lens of social semiotics, people choose the semiotic resources they do for their own good reasons, and people may use the same artefact for different reasons, each making meaning in ways that are relevant to their situation, an important point because it reminds us that these meanings are socially produced and changeable, rather than some static fact of nature (Van Leeuwen, 2005). This view of phenomena follows from James and Peirce, who argue that different phenomena carry different potential meanings for different people because of the unique, and incomplete, ways that individuals conceive of and perceive what is happening around them.

‘For James, our entire intellectual life consists wholly in substituting “a conceptual order for the perceptual order in which [...] experience originally comes (James, 1996, p. 51)”. We ‘chop up’ reality into discrete pieces to aid linguistic representation, and [...] inevitably distort or leave out

vital aspects of our lived experiences’ (Nayak & Chia, 2011, p. 290). In other words, although reality is a continuous unfolding of co-constituting processes, we use limited resources – language and other symbolic artefacts – to make sense of it, meaning certain things will be missed, and different people will miss different things. Unsurprisingly, the resulting differences have the potential to lead to profoundly different understandings of a situation, and therefore *different ways of acting* in relation to these understandings.

Such a view of meaning as underpinned by experience, and therefore varied, brings us back to the fundamentally co-constituting nature of meaning and action.

‘As soon as an act refers to something other than the [physical] here and now, [...] it is recognised by social beings as meaning something, connecting to antecedents [...] to past similar occurrences [...] to expected futures [and to] other acts taking place elsewhere. Action is a form of discourse, not a discourse in words, but a discourse in meaningful and recognizable types of acts’ (Lorino, 2018, p. 72).

Moreover, for these acts to be recognizable by others, they must include elements that are contextually understood by social participants. In other words, ‘to be meaningful, action must be mediated, that is, singular situated acts must be related with social meanings through systems of signs’ (Lorino, 2018, p. 72).

For Peirce ‘the meaning of a sign is not determined by its relationship with other signs [as in a Saussurian structuralist understanding], but it involves the social context of its use, the purpose of action-in-progress, and the temporal and social setting’ (Lorino, 2018, p. 45). Lorino illustrates this idea with the example of a group of picnickers. Upon encountering a large flat

rock, one of them says, ‘Look, that’s a nice table’ (Lorino, 2018, p. 41). Here a flat rock *serves the purpose* of a table and ‘the word [table] makes meaning not by mirroring the form or structure of the stone, but by relating this stone to potential social action’ (Lorino, 2018, p. 42). In other words, though we may agree that physical realities exist, for practical purposes they are meaningless outside of how humans interpret them (Watson, 2017). Likewise, with social constructions such as Agile project management frameworks. ‘Organisational rules, occupational cultures and so on are experienced *as if* they were ‘things out there’ [...and...] which human actors need to be aware of if they are going to be at all successful’ (Watson, 2013 in Watson 2017, Ch. 1 Para. 60).

2.5 Figured Worlds Theory

Holland et al (1998) propose a theory of identity that differs from some of the more cognitivist approaches identified by Brown (2021) that have had a large presence in management and business-related fields (see Section 2.3 above). Figured Worlds is a social practice theory of identity which describes the ‘imagined communities’ (Anderson 1983 in Holland et al., 1998, p. 247) in which identities are constructed and deployed. Phenomena are experienced and interpreted from within figured worlds which play host to contextually recognised Discourses that index one’s membership in relevant social spaces (Gee, 2015).

Terms other than figured worlds have been used to describe similar concepts such as ‘cultural models’, ‘frames’, or ‘schemas’ (Gee, 2014a, Ch 4, para. 1); however, Figured Worlds theory is distinct in its emphasis on how people are positioned and act within figured worlds, as well as how much ability people have to shape their identities and the figured world itself. Figured

worlds are not merely guides to action or frames of reference for meaning, rather they produce real effects in the lives of their participants and how they make sense of their place in the world (Gee, 2014a; Holland et al., 1998; Urrieta, 2007). Identities are thus inseparable from the figured worlds they reference and meaningless outside of them.

Within the context of figured worlds, identity may be further imagined in relation to the concepts of positionality, spaces of authoring, and making worlds (Holland et al., 1998). Positionality refers to the processes by which people are located socially in relation to others within a figured world. This may be done consciously or through habit. Positions are sought out, rejected, offered and negotiated. Some people may never be able to enter certain figured worlds; they will be blocked because of class, language, race, age, gender or other reasons (Holland et al., 1998). Other people are recruited into figured worlds (Holland et al., 1998) and may have no choice but to participate, such as people who are coerced into street gang membership. One's status or rank may vary from one figured world to another. The low-ranking school janitor during the week is also a high-status guitar player at the Friday night blues society jam session. Moreover, as a janitor, the individual may have little room to act outside of rules and norms established by school administrators and senior cleaning staff; however, as a skilled and respected guitar player, the sometime 'janitor' will have more agency, influence, and licence to challenge rules and enact a certain identity thanks to higher levels of social capital and power in the figured world of the local blues scene. The social 'room to manoeuvre' that one has to position oneself in a figured world is known as the space of authoring. According to Holland et al. (1998) it is within spaces of authoring where people possess agency with regards to their own identities which they improvise using the resources available to them. Finally, Holland et al.'s (1998) theory sees the

possibility of worlds as changeable; it is possible to make new worlds, whether through language, action, the insertion of new mediators into a setting, or by overlapping different figured worlds and experimenting with the responses arising from the interplay of different cultural artefacts. Holland et al. draw on Vygotsky and the concept of play to describe how the above practices and artefacts can come together to make new worlds and identities much like the way children take on roles and characters which are not their own when playing make believe. We may likewise perform different identities and play with different ways of being and seeing ourselves and we find a place within the spaces of authoring which are available to us as we imagine what could be (Holland et al., 1998; Urietta, 2007a).

Also, within each figured world exist different cultural tools ready to be used, to not only fashion identities, but also to do different things as a result. For example, according to Valdez:

‘People use symbols to organize and manage their own and others’ behavior. This can occur even in their physical absence. It is for this reason that it is important to think about how cultural resources are used. Remembered songs, the use of a particular language, re-creations of one’s story, can be used purposively to redirect oneself toward new action and to cast oneself in a new light within a figured world. [This] ... enables us to examine how new worlds and new identities are being created through tools with which individuals and groups manage one another and their own behavior’ (2006 in Valdez & Omerbašić, 2015, p. 230).

This emphasis on improvisation and the use of different artefacts in a figured world, artefacts which may include certain socially available identities as well, allows one to see how it is

possible to change worlds and thereby do things with identities as different worlds are brought together or artefacts are used or rearranged and in effect ‘played with’ to deal with things when situations change or we encounter challenges.

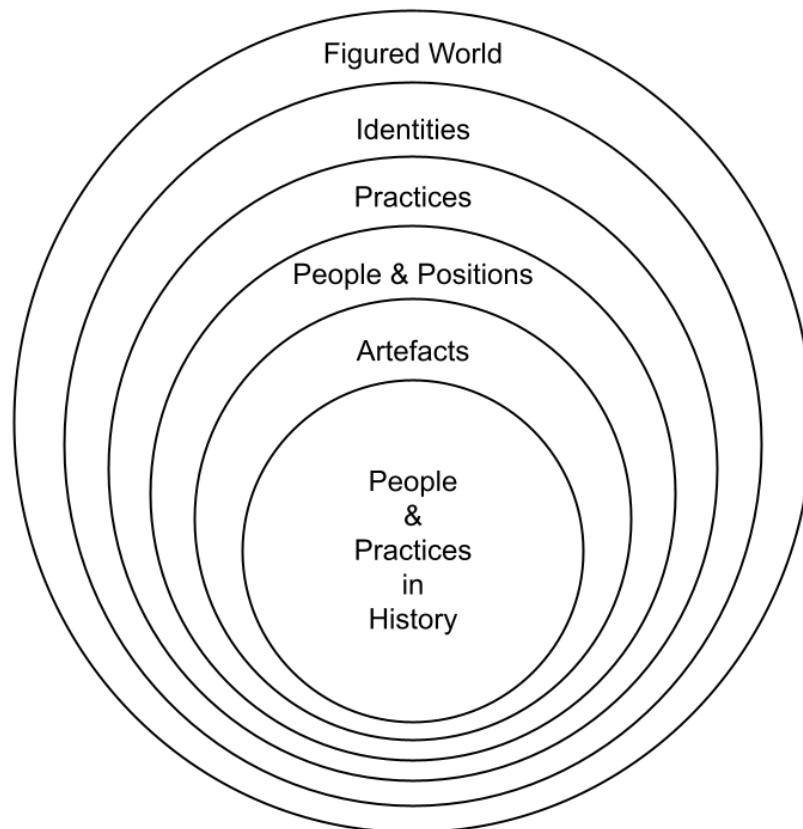


Figure 2-1. Figured worlds arise from people and practices in history and comprise recognizable artefacts, people (agents), their positions, and their practices to produce recognizable identities which both define and are defined by the figured world

Figured worlds thus bring together the historical, the material, and the ideational. Figured worlds are produced through the historical interweaving of activity, artefacts, and people and the shared understandings which arise as a result (see Figure 2-1). Actions that people take have meaningful

effects in relation to how they are *understood* within the context of the figured world. As Holland et al. illustrate:

‘In the world of AA [poker chips] were not won by holding a straight flush. Rather, they were meaningfully revalued to a world where the stake, the thing at wager, was staying sober; the chip became an emblem of a different achievement, another kind of success. On the store’s shelf the poker chip is worth little, but within the world of AA the significance of a chip, color-coded for length of time without a drink, is great. The difference between picking up and not picking up a chip, is for some, the difference between a good life and a bad life’ (1998, p. 51).

Thus, as with a Pragmatist view of things, although figured worlds are imagined, they are real in the sense that what happens within them has *real consequences and material effects*.

2.5.1 Self authoring and ventriloquation

In Figured Worlds theory, Holland and colleagues also draw on important concepts from Bakhtinian analysis, particularly ideas of multivoicedness, dialogism, and what has become known as ‘ventriloquation’ (Wertsch, 1991). Bakhtin’s conceptualization of the self mirrored the Pragmatist Mead’s, imagining an ‘I-for-myself’ and an ‘I-for-others’, both of which also incorporate the voices of others or the ‘other-in-myself’ (Holland et al., 1998, p. 178). As people author themselves they thus draw on the ‘voices’ of others both within figured worlds and across time, speaking the ‘languages’ of different worlds and fields. For example, while undertaking a marketing campaign a marketer may incorporate language from Agile software development when discussing ‘daily standups’ (meetings), or the language of sports when talking about executing a ‘game plan’ and getting everyone to ‘play their positions’. Consequently,

‘communications with one another not only convey messages but also always make claims about who we are relative to one another and the nature of our relationships’ (Holland et al., 1998, p. 26). In one case marketers are like a group of high tech software coders, in another they are like athletes on a team. Identity work is not something that just happens inside our own heads; it happens ‘out there’ in the world in conjunction with others who play no small part in who we are.

2.5.2 Thinking about artefacts

Figured worlds are assemblages of ideas, times, values, vocabulary, and physical artefacts which situationally ‘trace our participation, [and] especially our agency, in socially produced, culturally constructed activities, such as the worlds of romance’ (Holland et al, 1998, p. 40) or, in the case of this study, Agile marketing. Figured worlds bring together mental and physical activity and according to Holland et al. (1998) are characterised by a number of common features:

‘(1) Figured worlds are cultural phenomenon [sic] to which people are recruited, or into which people enter, and that develop through the work of their participants. (2) Figured worlds function as contexts of meaning within which social encounters have significance and people’s positions matter. Activities relevant to these worlds take meaning from them and are situated in particular times and places. (3) Figured worlds are socially organized and reproduced, which means that in them people are sorted and learn to relate to each other in different ways. (4) Figured worlds distribute people by relating them to landscapes of action; thus activities related to the worlds are populated by

familiar social types and [play] host to individual senses of self (Urrieta 2007, p. 108).

Figured worlds thereby circumscribe what are considered to be ‘normal’ ways of being in different contexts (Gee, 2014a) and are therefore ‘intimately tied to identity work’ (Urrieta 2007, p. 107). By bringing together numerous social artefacts into one space they serve as heuristics or shortcuts we use to make sense of our place in the world and ‘how things work’ (Gee, 2014a; Urrieta, 2007).

Such a perspective has implications for how we might study identities. Drawing on ‘Vygotsky and Bakhtin, Holland et al. suggest that cultural production and heuristic development are important processes for identity analyses because they move us away (but not completely) from cultural determinism and situational totalitarianism to make (some) way for the importance of improvisation and innovation (agency). In this sociocultural practice theory of identity and self, attention is focused on identities forming in process or activity’ (Urrieta 2007, p. 107). This view brings us back to the importance of mediation.

Figured worlds supply the artefacts, and the frames of reference, which mediate situated meaning. As Holland et al. state, ‘Figured worlds are evinced in practice through the artefacts employed by people in their performances. Such artefacts are pivotal in the sense Vygotsky attributed to them in play. Artefacts “open up” figured worlds. They are the means by which figured worlds are evoked, collectively developed, individually learned, and made socially and personally powerful’ (1998, p. 61). Moreover, ‘Artifacts gain force in connection to figured worlds and assume both conceptual and material aspects as practical instruments for daily use

and as artifacts of collective memory; thus, citing from Cole, Holland et al. state that artifacts bring “developmental histories” (p. 62) of past activities to the present’ (Urrieta, 2007, p. 110), something that we will see to be important later in Chapter 9 as I explore the transformation of marketing practice in our primary case study.

Similarly, as both Peirce and James argue, the meaning of objects is not found in the abstract definition of things, rather in the anticipated effects that things produce in action (Lorino, 2018). So, as Lorino illustrates, simply looking at tree branches and thinking of them as a source of fuel doesn’t happen because of a definition of logs as being made from trees, rather it has meaning because of the chain of meaning in the actions of cutting tree branches, then burning them, which produces heat (Lorino, 2018). For example, a conversation between a husband and wife about the house being cold leads to the husband taking a walk in his boots to the woodlot to look for deadfall. A chainsaw leads to the cutting and trimming of tree branches into logs. An axe splits the logs into firewood and kindling. A hearth and matches turn the wood into a fire which turns the wood into heat which originated in a conversation about being cold. The fire produces a feeling of competence and along with the thanks offered by his wife helps construct the husband's identity as a ‘provider’.

The above example may seem unremarkable; however, in moving beyond surface phenomena deeper questions arise. Which boots? Red Wing work boots or Blundstones? Why? What kind of chainsaw? Why not a hand saw? And why a log fire in the first place and not an electric space heater? This concept of chains of meaning in action has significant implications for how one may conduct inquiry, and thus the general methods I used in my study. Although looking at each stage

in the process in isolation can tell us something about the individual stage, which might be interesting in itself, it can never help us understand the whole just on its own. We need an approach that brings multiple methods together, the subject of the next chapter.

2.5.3 Figured worlds as tools for research

In summary, Gee gets to the essence of Figured Worlds theory by looking at figured worlds as ‘tool[s] of inquiry’ (2014a, Ch. 7), offering a set of questions that can help us to retroductively discern some characteristics of a figured world:

‘For any communication [or activity], ask what typical stories or figured worlds the words and phrases [...or actions...] of the communication are assuming and inviting listeners [or observers] to assume. What participants, activities, ways of interacting, forms of language, people, objects, environments, and institutions, as well as values, are in these figured worlds?’ (Gee, 2014b, Ch. 4.8).

Identities and identity work, then, are very much about doing. I thus propose a modification of the definition of identity work put forward by Caza et al (2018) to underpin my investigation, with my modifications in brackets:

‘Identity work [...] consists of the cognitive, discursive, physical, and behavioral activities that individuals undertake with the goal of forming, repairing, maintaining, strengthening, revising, [...] rejecting [*and using*] collective, role, and personal self-meanings [*in the figured worlds they inhabit*]’ (p. 895).

2.6 Conclusion

This chapter presented my position as a researcher with a particular history of practice which has informed the sorts of questions I address in this thesis. I also discussed the general theoretical underpinnings which guided my investigation, namely: philosophical Pragmatism, multimodality, and Figured Worlds. I show how these three elements can be brought together into a cohesive framework which ties together an interpretive logic of inquiry of how meaning and identity are co-created in action in the context of socially constructed worlds composed of artefacts which both afford and constrain human agency. Such an approach opens up the possibility of more holistically studying the transformation of marketer identities than do reductionist individualist frameworks. The next chapter provides an overview of the general methods used to undertake my study.

Chapter 3. General Methods

3.1 Introduction

In the previous chapter I provided an overview of the theoretical underpinnings of my thesis, with the understanding that I would provide additional detail and material from the relevant literature as needed in future chapters. Similarly, in this short chapter I will present an overview of my methodological approach and offer a rationale for the choices I made about the basic strategies that I adopted (for example ethnographic ways of writing) and then later provide further detail in each empirical chapter about specific tactics (such as thematic analysis and coding frames) at that time. The reason for dividing up my methods discussion in this way is that the epistemological stance informing this thesis, and the types of research problems I address, led to a multi-method research design. Consequently, including everything in one lengthy complex chapter would have potentially been quite confusing compared to what I present here. With this view in mind, I shall now continue where I left off in Chapter 2.

3.2 Chains of meaning, and what they mean for social research

In the last chapter I noted how thinkers ranging from Peirce and James, to Vygotsky, Bakhtin, Scollon, and Holland et al. helped articulate the idea that identities, meaning, and the social order more generally, come together through mediated action as we draw upon various available artefacts to live our lives. Whether one calls them semiotic resources, cultural tools, mediational means, or bundles them into ‘identity kits’ (Gee, 2014), these artefacts provide the ‘substance’ through which identities and meaning are co-constituted in practice. Importantly, these social

processes have both an historical dimension and a future orientation (Lorino, 2018, Simpson and den Hond, 2022). Consequently, constructing an understanding of the social world which acknowledges the processual nature of how things work in practice means that one cannot easily adopt reductionist methods and claim to know what is ‘really going on’ in a given situation. As the illustration of the husband who built a fire showed in the last chapter, the mediational means used in a practice do not remain static; they change and may even be invented ‘on the fly’. Designing a study to explain how a fire warms a kitchen and focusing only on the matches misses out on the conversation between the husband and wife, the husband's boots, the woodlot, the deadfall, the branches, chainsaw, logs, axe, kindling, and hearth and what each of these artefacts means to the people in the situation. Presuming to know in advance what the salient artefacts will be in any given case of meaning making is arguably naive, if not presumptuous. Sociocultural inquiry demands, therefore, that we use methods which enable us to get much closer to what is happening in figured worlds, *as these worlds are being constructed*.

3.3 Abduction

I have already noted the relative lack of academic literature on the identity implications of the digital transformation of marketing practice for marketers. This reality necessitated that I include an exploratory element in my thesis as a way to orient myself to the general issues as experienced by marketers from a variety of backgrounds in a variety of settings. In keeping with my overall Pragmatist approach I looked to apply abductive logic (introduced in section 2.4.1.1) in designing my research as a way to remain flexible about where the project might lead. Abduction is particularly good for exploratory research because it helps us ‘[expand] the realm of plausible explanations. We [give] ourselves a chance to see things that we might otherwise

miss by staying with tried-and-true explanations' (Given, 2008, NP). One starts with a general problem and teases out specifics iteratively, possibly realising the problem has evolved, proposing explanations and working with them until they fail and a new, better, more *plausible* explanation arises based on newer, better, information. See Figure 3-1 on the following page for a method map that illustrates the iterative approach I took in developing this thesis.

Such an approach stands in contrast to most marketing research which adopts a positivist stance and assumes that all relevant 'data' already exists in the form of facts independent of the researcher and the design of the research (Schwartz-Shea & Yanow, 2012). Meanwhile, some forms of interpretivist research take exactly the opposite stance, arguing that there are no 'facts' independent of language and that 'data' or 'empirical material' is generated by the researcher and participants as the research is carried out. My position lies somewhere in the middle. Following Watson (2011; 2012), I concur that social facts exist in abundance (yesterday someone was employed at a firm; today he is not) but what makes them interesting is what they *mean* to the people in the world under study and what their interpretations *lead* to. One might ask a participant, 'How did you lose your job?' And they might reply, 'I didn't *lose* my job. I know exactly where it is. My former boss's new *son-in-law* has it. So I've called a lawyer'.

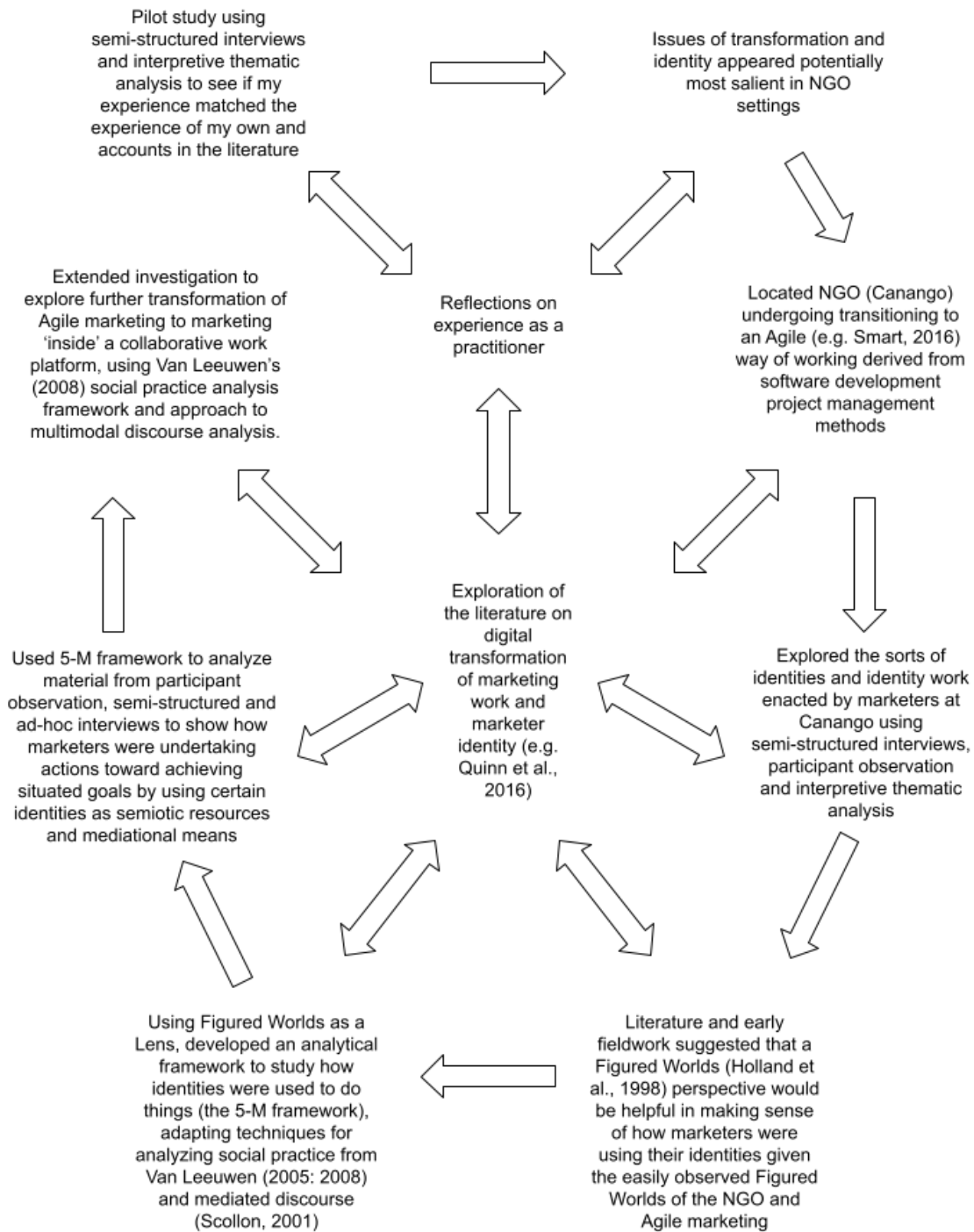


Figure 3-1. Method map showing the abductive development of this thesis, beginning at the upper left corner. Each stage involved reflection and engagement with the literature.

In the above example, what the researcher initially thought was the salient question for the practitioner turned out to be different from the practitioner's perspective. The interesting question turned out to be not, 'How did someone *lose their job*' but rather, 'How did someone *steal my job*'? Or, perhaps from a more academic standpoint, 'How does nepotism happen in family-owned businesses'? Yet, how would one design a study to answer such a question in a meaningful way? From a pragmatist perspective, one wouldn't. Deciding, 'I'm going to go out and ask a company director if it would be okay if I asked them a few questions about why they are so nepotistic' would be unlikely to be successful. Instead, in Pragmatist interpretive research, questions of this sort may emerge from the inquiry itself. Set questions may serve as a starting point but as the process of abduction gets underway, new directions and forks in the road will inevitably appear. For this reason, although I started my project with a sense that it would be about marketer identity and digitalization, thanks to my own life experience and early exploration of the limited literature on the topic, I felt that a pilot study would help to get a better sense of the salient issues for marketing managers and the people they manage.

3.4 Undertaking a pilot study

Pilot studies are relatively rare in qualitative research, particularly ethnographic research (Sampson, 2004), with some authors questioning the need for them at all (Malmqvist et al., 2019). Generally, though, the few papers about qualitative research and pilot studies point toward their usefulness. Sampson (2004) notes that while pilot studies can aid in refining research instruments in more positivistic studies they have broader benefits in all types of qualitative studies. Such examples include alerting one to possible problems and unforeseen questions about the comfort level of research participants with the researcher's presence, the effectiveness of

interview questions in generating usable insights, and so forth. Malmqvist et al. (2019) further point out that pilot studies in qualitative research projects enable one to learn about issues of interview management and Williams-McBean (2019) lists their usefulness in designing participant recruitment, and providing higher overall confidence levels for reviewers around issues of rigour and credibility, in addition to giving researchers new to qualitative methods experience in various qualitative techniques.

In my case, in addition to hearing from a variety of marketers about what they think about the digitalization of marketing, the pilot study would help me get some sense of how effective semi-structured interviews would be at helping me understand my initial research questions and whether I should change direction. The interview material would also enable me to explore several analytical techniques such as thematic analysis and various approaches to discourse analysis, including later the use of Gee's (2014b) figured worlds tool. The pilot study would also provide a sense of the sort of research sites that might be interesting to explore as part of a larger field study (in my case the pilot pointed toward studying an NGO, which was unexpected). For reasons of logistical simplicity, I chose to start with semi-structured interviews. I have the benefit of an established network of marketing practitioners at all levels in both large and small organisations who were able to refer me to potential interview participants. I will cover the pilot study in detail in chapter 4; but for now the results of the pilot study led me to revise my initial research idea from one where it was assumed that technological artefacts would play a major role in the identity work of marketing practitioners to the view that shifts in practice, *in which artefacts were used as mediational means*, were more salient.

My pilot study involved interviewing 17 marketers in eight organisations (both for-profit and not-for-profit) at a variety of levels from a junior level technician in a multinational farm equipment manufacturer to a senior vice president in a hotel chain. I tried to include participants who had experience in marketing dating from before the dominance of the Internet as a marketing communications channel since they would have lived through a major change in practice. Interviews had both relatively structured and free ranging elements and ran between 30 and 90 minutes, depending on participant availability. The results of this pilot study led me to suspect that the digitalization of marketing was, as in the case of IT use more generally, as much or more a matter of practice and organisational structure (Orlikowski, 2000) as it was technological affordances and constraints; it also suggested to me that the non-profit sector would be an interesting one to explore since the transformations seemed to be more far ranging than in the for-profit sector. As has been happening for years, not only are many NGOs engaged in digitalizing their marketing practices, they are also undergoing a shift in orientation from a more traditional community ethos to one that borrows heavily from ideas and vocabulary originating in business (Bromley and Meyer, 2017) as the language of business continues to further colonise other domains (Mautner, 2010). I thus sought and gained access to a nationally known Canadian NGO (hereafter called 'Canango') involved in supporting social service delivery and community economic development. The advantage was that although I did not know anyone at the organisation personally, I had worked with several people who themselves had been employees of the organisation in the past and by mentioning this was able to gain the trust of senior managers when I approached them, as well as have prior knowledge that there had been changes at the senior level in marketing, thereby making Canango a good candidate to exemplify an NGO undergoing changes in marketing practice. Additionally Canango had been

the subject of earlier research studies by other university social science departments and was therefore amenable to having me around, as many people in the building had experienced what it was like to be part of research projects before.

The next phase thus involved a roughly six-month, multi-method, ethnographic style study. The project progressed from a general investigation of the various marketer identities constructed at Canango, to how those identities are used within a figured world of Agile marketing, and then how the digital transformation of project management processes through software adoption changed practice in what had latterly become a new figured world 'inside' a collaborative work software platform (See Chapter 9). Following Humphreys & Watson (2009) and Watson (2011), I see ethnography as what results from the application of numerous methods, rather than as a method, *per se*. 'Ethnography is most usefully defined as a style of social science writing which draws upon the writer's close observation of and involvement with people in a particular social setting and relates the words spoken and the practices observed or experienced to the overall cultural framework within which they occurred' (Watson, 2011, p. 205). As Watson notes (2011), the advantage of this view is that it serves to help focus the product on the people and the activities they undertake within a cultural milieu, rather than as objectively found and analysed 'data' divorced from the social realm in all its messiness. This realisation subsequently encourages the researcher to apply a wider range of methods so as to jump headlong into the mess, whether that involves 'naturalistic' observation, document analysis, interviews, small surveys, or focus groups. I thus adopt a variety of tools and techniques of inquiry to produce empirical material, including participant observation, structured and unstructured interviews, document analysis and multimodal discourse analysis.

The bulk of the fieldwork involved participant observation involving attendance at meetings, sitting and working in the work pods of the marketers at my case site, having coffee breaks with workers and conducting informal ad hoc interviews as I moved about the office throughout the day. I also held several rounds of semi-structured interviews with members of the marketing team, as well as several people from outside the department who had regular contact with the department, including in one case, someone who had previously been part of the marketing team but was moved out of the department to a new role as a result of shifts in practice. I also asked questions on an ad hoc basis as I noticed the Canango marketers doing things I had not seen them do before. The early phases of the participant observation led to Chapter 6, which involved categorising and analysing marketer identities thematically, including what the identities enabled people to do. I engaged in multiple rounds of close reading of both field notes and interview notes to define five key classes of marketer identities in play at Canango, namely: *managerially supplied*, *emergent*, *performed*, *socially afforded* and *technologically afforded*. I then identified examples of the implications of each class of identity in practice.

Noting the ways in which various identities were used by marketers at Canango further led to the need for an analytical framework to help me investigate in more detail how identities are instrumentalized by marketers to accomplish things. I thus brought together several streams of compatible theoretical literature about identity, figured worlds, meaning, and action to develop a framework that enables the cross comparison of identity work processes over several phases, from the occurrence of a phenomenon, through processes of meaning making by those affected, through the use of mediators to then construct an identity with affordances and constraints which

variously enable or inhibit certain types of action. This framework was then applied to an investigation which involved a cross comparison of how three different marketers used their identities, described in Chapter 6, illustrating how different people appropriated and instrumentalized a common managerially supplied identity in different ways to achieve their aims, while at the same time another person mobilised an emergent identity to resist the norms of the figured world of Agile marketing.

During the fieldwork, a key member of the marketing team (and one of the people upon whom I focus in Chapter 8) left for another organisation and this led to the adoption of a new group collaboration software platform with significant implications for how work was managed from then on, effectively transforming the world of Agile marketing into something new. During this time, Covid-19 forced everyone to work from home as well, which led to a further adoption of digital technologies in practice. This phase of the study led to the application of a multimodal discourse analysis framework developed by Djonov and Van Leeuwen (2018) and, as far as I am aware, the first multi-modal analysis of Agile marketing management practice. I adapted frameworks from Van Leeuwen (2008) for the study of the transformation of practice for this final fieldwork phase, as well. I was fortunate to have been granted manager-level access to the project management platform for this phase, enabling me to trace developments over the course of several entire projects. I then conducted a comparative analysis of the world of marketing as informed by an earlier traditional NGO ethos, to one based on what have become typical Agile marketing methods in business, to the newer platform-style environment, or what I label 'Monday marketing', named after the platform in use, Monday.com.

3.4.2 Methodological implications for theory development

Theory is a contested concept, and ‘the word “theory” can take on many different meanings depending on how and in what context it is used’ (Sandberg and Alvesson, 2021, p. 488); however, in the various management-related fields theory has most often been assumed to mean ideas of an *explanatory* nature (Sandberg and Alvesson, 2021). Explanatory theory is grounded in a number of assumptions about the world, what we can know about it, and how. For example, scholars who put forth explanatory theory conceive of social phenomena as objective ‘things’ that exist ready to be defined as variables and then measured objectively by the researcher. This done, one may then look for interactions among these variables that enable generalisation and prediction based on causal relationships which define operative mechanisms (Sandberg and Alvesson, 2021). Moreover the theory should match the data as it relates to the who’s, what’s, how’s, why’s, when’s and where’s of the phenomena, enabling testing and confirmation through deductive methods (Sandberg and Alvesson, 2021). Alternatively, theory may be developed inductively for the purposes of producing hypotheses which may be then tested for generalizability using quantitative measures (E.g. Eisenhardt, 1989).

Despite its popularity, Sandberg and Alvesson (2021) challenge the hegemonic grip that explanatory theory seems to have over many management disciplines, even while other social science disciplines are more amenable to alternative understandings of what constitutes theory and how it may be generated. Arguing that explanatory theory is both limited and limiting in terms of what management researchers can come to know about the world, they undertake a broad review of several areas of management scholarship and develop a practical definition of theory and theorising, then use it to build a typology of different kinds of theory and theory

generation each with different operating assumptions, affordances, constraints, and practical considerations for research design.

According to Sandberg and Alvesson (2021), to be reasonably considered as a scientific theory, a knowledge claim should have the following six characteristics:

1. 'It needs to have a *purpose*' [...];
2. 'It should be directed to a *phenomenon*' [...];
3. 'it must offer some form of *conceptual order*' [...];
4. 'it must provide some *intellectual insights* about the phenomenon' that consist of more than common sense;
5. A theory must 'include *relevance criteria*' so that it may be evaluated against its intended purpose; and,
6. Theories are 'always constrained by *boundary conditions*' which confine [their] scope (p. 491).

Using these six characteristics, Sandberg and Alvesson then categorise five different theory types: *explaining theory* (already mentioned), *comprehending theory*, *ordering theory*, *enacting theory*, and *provoking theory* (2021, p. 496). Explaining and comprehending theories focus on explaining things and helping us understand them respectively; while ordering theories organise phenomena into categories, enacting theories construct insights about how processes unfold, and provoking theories challenge the way people see or understand phenomena (Sandberg and Alvesson, 2021).

In this thesis my purpose is not to explain phenomena with causal models, or provoke or challenge existing assumptions in radical ways; rather, given that there has been relatively little prior work done around marketer identities, and the implications of digital transformation on marketer identities more specifically, I take more of an empirically-driven exploratory approach.

Thus, the ideas I present, and the methods I used to develop them, are intended to help us understand what is happening, organise what we know about what is happening, and provide a realistic narrative of how the processes of identity construction and deployment unfold in a marketing world undergoing increasing digitalization. I will therefore now look at three of Sandberg and Alvesson's (2021) theory types in more detail (*comprehending, ordering, and enacting*) and relate them to upcoming chapters.

3.4.2.1 Comprehending theory

According to Sandberg and Alvesson (2021) comprehending theory is interested in understanding the meaning of phenomena, for example 'what phenomena such as "decision", "diversity" and "identity" are about' (p. 499). Although research involving comprehending theory studies local phenomena and is bounded by specific contexts, comprehending theory may attempt to move beyond how the research participants understand a phenomena to include more comprehensive and complete understandings across perspectives and thus open up new pathways or insights that prior theory of this type may not include (Sandberg and Alvesson, 2021). Ultimately the goal is to provide understandings about what phenomena mean that are plausible and '[...] develop a meaningful interpretation of the social world, or some significant part of it ... so that people may have a clearer understanding of their world, its possibilities of development, and the directions along which it may move' (Blumer, 1954 in Sandberg and Alvesson, 2021, p. 499).

In this thesis, comprehending theory is most applicable to the insights I develop in Chapters 4, 8 and 9, but especially Chapter 4. The purpose of the pilot study described in Chapter 4 was to

better understand how some marketers from a range of backgrounds and in a variety of contexts understand what digitalization and marketing are all about today as opposed to the recent past, given the speed with which the field is evolving. Ultimately understanding what some of the salient issues were would help design the rest of the study, culminating in Chapters 8 and 9 where ethnographic fieldwork was used to understand what digital transformation and a shift to Agile marketing meant to the marketers at Canango in the hope of gaining some transferable insights which may apply in similar environments. By taking a multiple method qualitative approach to gaining these insights, the stage was also set to look at the situation at Canango in terms of what was being enacted.

3.4.2.2 Enacting theory

‘[T]he overall *purpose* of enacting theory is to articulate how phenomena are continuously produced and reproduced: that is, the processes through which they emerge, evolve, reoccur, change and decline over time’ [emphasis in original] (Sandberg and Alvesson, 2021, p. 502). Because enacting theory is interested in process, it sees phenomena not as fixed things ‘out there’, rather as part of unfolding open-ended fields of activity. ‘Theoretical attention is focused upon the transformation through which one set of arrangements gives way to another’ (Sandberg and Alvesson, 2021, p. 303). Such transformations are the focus of Chapters 8 and 9, where I trace the evolution of marketing practice at Canango from its original ‘NGO helper’ world or way of being, to first the world of Agile marketing with a different set of assumptions and defining artefacts, and finally a further shift after a personnel change and the introduction of a specific type of group collaboration software platform which, in turn, offered up different ways of being agile marketers. Enacting theory may be said to be relevant when it has ‘[c]learly

illuminate[d] the logic of key processes through which phenomena are (re)produced' (Sandberg and Alvesson, 2021, p. 496) and the processes which are being claimed to unfold should be visible in the empirical material which will ultimately lead to the explication of some new process or by upending existing ideas in such a way as to lead people to different conclusions about the way things work. In either case, however, one must organise phenomena in some comprehensible useful fashion, the purpose of the third type of theory relevant to my thesis: ordering theory

3.4.2.3 Ordering theory

The purpose of *Ordering theory* is 'to categorize phenomena in theoretically useful ways' (Sandberg and Alvesson, 2021, p. 501). This emphasis speaks to the view that phenomena are not naturally organized and deterministic but rather uncertain and therefore we need a way to provide structure so that we may do things with our observations about them. This is done 'by categorizing, sorting and shaping them into specific classificatory systems, such as typologies and taxonomies that can be used productively for intellectual purposes, including pattern seeking and comparative analyses' (Sandberg and Alvesson, 2021, p. 501). The boundary conditions of an ordering theory are defined by the categories used in the typology itself, and these need not correspond to 'reality' or accurately 'represent' what is 'actually' taking place, rather the categories must serve as a tool for accomplishing clarity and structure so as to be able to 'see how things may hang together: tightly, loosely, or not at all' (Sandberg and Alvesson, 2021, p. 502) and then what this means for how we may come to make use of our new way of ordering the phenomena.

In my thesis, the idea of ordering theory underpins Chapter 6 (where I categorise various types of marketer identities at Canango and what they enable the marketers to do) and Chapter 7, where I bring together ideas about identity and agency from Figured Worlds theory, Pragmatism, and Multimodal discourse analysis to develop the heuristic framework that I used in Chapter 8 to study how marketers deploy their identities to accomplish situated goals. Van Leeuwen's (2005; 2008) social semiotic approach to analysing social practices in particular makes use of inventorying artefacts which I then organise to form an outline of the various Figured Worlds that marketers inhabit.

Later, in Chapter 10, I logically summarise my empirical material in lists of assertions to organise my ideas about them, which I further develop more along the lines of enacting theory to gain broader insights about what is going on with the digital transformation of marketer identities at my main case study site, Canango.

3.5 Summary

This chapter provided an overview of the methodological implications of my adopted research philosophy, followed by a discussion of the general methods that I applied in my investigation, including ethnographic writing, participant observation, semi-structured and ad-hoc interviews, document analysis, thematic analysis, critical discourse analysis and multi-modal discourse analysis. I also outlined the abductive nature of how the various phases of the research design came together beginning with a pilot study, leading to the selection of an NGO as a case study site, then shifting the focus of the study from identity construction via digital marketing technology to one of the transformation of marketer identities through the evolution and

interplay of various figured worlds of marketing, and the practices and artefacts of which they are constituted. I ended the chapter with a discussion of Sandberg and Alvesson's (2021) typology of different categories of theory, identifying the types that I use in this thesis, namely *comprehending theory*, *enacting theory*, and *ordering theory* and where they turn up in later chapters.

I will now move on to a discussion of the first empirical phase of my thesis; a pilot study titled, *The digitalization of marketing practice: themes and understandings from the practitioner perspective*.

Chapter 4. The digitalization of marketing practice: themes and understandings from the practitioner perspective

In Chapter 3 I wrote about the need for an exploratory study of how marketers make sense of digitalization and where identity work might fit into such processes. This chapter describes a pilot study I undertook with those goals in mind and, to some extent, may be seen to stand alone from the rest of the thesis while simultaneously setting the stage for the main case study. Ultimately I used the pilot study to discern some of the salient identity-related issues for people experiencing the digital transformation of marketing. The participants included marketing managers and junior marketing workers, as well as people in other functional roles, such as software developers, who now find themselves directly involved in marketing-related work. As background, I will begin with a brief overview of the changing nature of marketing due to the digital transformation of practice, a theme which has been well documented elsewhere, then present my pilot study design, participants and methods. I will follow this with a broad summary of my empirical material, followed by a more detailed presentation of several key themes which emerged from the pilot, discussing them in relation to Figured Worlds theory (Holland et al., 1999).

4.1 The figured world of marketing

Like all social inventions, marketing and how it is understood has not remained static over its history. In this way it is like all figured worlds in that it is made up of artefacts imbued with

symbolic value which are used in practices by the people who are recruited into, build, and change what people see to be ‘normal’ in reference to that figured world (Gee, 2014).

According to Baker (2016), modern marketing has its antecedents in the late 19th century when industrial scale production of goods led to the need to maximise sales output underpinned by an ethos of ‘selling what we can make’ (p. 6). Over time, however, this approach proved untenable as it became obvious there were mismatches between production capacity and what it was that people seemed to want to buy. Thus, by the 1950s, in America at least, marketing saw the move away from a ‘selling orientation’ toward what came to be known as a ‘marketing orientation’ or a shift toward perceived customer needs and ‘making what we can sell’ (Baker, 2016, p. 7).

Along with this change in orientation, marketing also moved away from being seen as the process of stimulating demand for existing products toward a philosophy that looked more closely at designing businesses activities around what consumers seemed to want (Baker, 2016). This shift was consequential in that it saw marketing take centre stage, as a core *raison d’être* of business, rather than merely a function, culminating in the so-called ‘marketing management school of thought’ (Baker, 2016, pp. 9-10). Eventually the marketing management perspective invented concepts such as the ‘4-Ps of marketing’ and the ‘marketing mix’ which continue to be taught in business schools and applied to this day (Baker, 2016, pp. 9-10).

During this time, marketing also came to be closely associated with neoclassical economic theory grounded in exchange and the idea that consumers are rational actors whose focus is utility maximisation (Varey, 2016). Unsurprisingly marketing management itself took on an aura

of rationality, with influential marketing scholars such as Kotler introducing an approach to marketing management involving a linear process of ‘analysis, planning, implementation, and control’ (Baker, 2016, p. 10). Ironically, this *APIC* process contrasted with the original idea of a bottom-up customer focused marketing orientation to offer more of a sense of marketing as being something that is done *to* customers rather than done *for* them (Baker, 2016, p. 10).

More recently dissatisfaction with this linear top down approach, led to concepts such as Vargo and Lusch’s (2004) *service dominant logic* and *customer relationship management* which evolved out of developments in contact management software for sales in the late 1980s (Xu, Yen & Chou, 2002). Most recently, in light of Internet and mobile technology which give consumers enormous power to gather and share information and opinions about business, marketing has again evolved toward concepts such as tribal marketing, social marketing, and transformational marketing which claims to engage companies and consumers in co-creating value (Baker, 2016). Marketing has thus ‘evolved from a focus on marketing as a function, through marketing as a managerial practice to marketing as exchange’ (Baker, 2016, p. 18).

As these shifts in orientation and outlook have developed, so have various formal definitions of marketing. For example, Kotler defines marketing as: ‘*The set of human activities directed at facilitating and consummating exchanges*’ (1972, in Baker, 2016, p. 8). Meanwhile, according to the UK’s Chartered Institute of Marketing: ‘*Marketing is the management process responsible for identifying, anticipating and satisfying customer requirements profitably*’ (2007 in Baker, 2016, p. 8). Baker, meanwhile, proposes a definition of marketing as: *the ‘creation and maintenance of mutually satisfying exchange relationships*’ (Baker 1976, in Baker, 2016, p. 18). Varey, taking a

critical view puts it more bluntly: ‘*Marketing is the managerial technology for ensuring that the “perfect” market is not allowed to operate*’ (2016, Ch. 5); after all, there is no shortage of examples of oligopolistic behaviour, minimum advertised pricing policies, and so-called ‘retail display allowances’ which limit access to certain distribution channels or artificially inflate prices.

While definitions such as those above each have slight differences, they all share a common foundation grounded in economic exchange, whether positive or negative. Moreover, while authors such as Kotler and Murray (1975) and Kotler (1979) have played a role in extending the marketing management paradigm beyond the world of for-profit business to include the non-profit sector, these definitions remain inadequate in view of the changing nature of marketing in a world of ubiquitous Internet and social media, hyper partisan politics, and NGOs facing continued cuts to government funding. Marketing work is now spread throughout organisations, as we have seen, and the tools and techniques of product and service marketing are now in common use in *non-economic* realms such as conspiracy politics (Madisson and Ventsel, 2020; Visentin, Tuan, and Di Domenico, 2021) and the selling of ‘ideas’, intangibles, social behaviour and worldviews to targeted groups, exemplifying practices within what has become the subdiscipline of ‘social marketing’ (Lee and Kotler, 2019.; Levine and Duncan, 2022).

4.2 Where has the digitalization of marketing been, and what is next?

Quinton and Simkin (2016) undertake a review of digitalization and how it has transformed marketing using the metaphor of a journey, arguing that there will never be a final destination but only continuous evolution. They categorise four signposts on the ‘journey’ beginning with

‘Waking up and starting out’ which dates back to the mid 1980s with a sense that the way people and technology interact would be having important effects on market behaviour from both the consumer and practitioner side (Quinton and Simkin, 2016, p. 3). By the early 1990s researchers and practitioners were beginning to think about what potential the Internet might hold for marketing along with the arrival of ‘a new marketing paradigm’ centred on electronic commerce (Donna and Novak, 1997). The next stop on the digitalization journey was the ‘identification of essential travel kit’, including a recognition that before electronic commerce on the World Wide Web could fully emerge, consumers would have to come to trust the online world and organisations would have to come to understand the implications of how to use the technology, from integrating websites and offline communications, how web traffic is generated and the dark arts of search engine optimization (Quinton and Simkin, 2017) in a world when Google still only had a few hundred employees. By the mid-00s to the mid-2010s, the next phase, ‘Travelling companions and communities’ developed, wherein marketers and academics came to understand the importance of interactions and communication within and across communities that were forming online around an endless array of interests (Quinton and Simkin, 2017). Moreover, by now the ‘technicalization’ of marketing had led to increased complexity and divergent skill sets and the need for more highly specialised expertise and a greater importance on strategic integration of technology and practice and the creation of value, a key reason for Quinton and Simkin (2017) to bring in the last stage of the journey ‘early reflections’.

According to Quinton and Simkin (2017), a range of implications for marketing are visible in light of where digitalization has come from and where it may be headed. On the general observations side I summarise Quinton and Simkin’s (2017) findings as the ability of

digitalization to foster connections with and between consumers and businesses has fundamentally changed the nature of exchanges to make them at once more complex and more about finding ways to co-create opportunities and value because consumers now routinely find out more about organisations and their offerings from sources *other than* the organisation itself. Therefore, companies which do not grasp this and attempt to avoid the change by operating on the periphery and avoiding digitalization will struggle in the future as it will be essential to continue to be where consumers are. In the future it will be important for organisations to acknowledge complexity and work at fully integrating digitalized marketing with all other areas of the organisation lest various specialised tasks be assigned to other functional areas or outside vendors with the requisite expertise or interest (Quinton and Simkin, 2017).

4.3 What does marketing work entail, today?

The digitalization journey mapped by Quinton and Simkin (2017) points to fundamental change which underpins how marketing work has come to evolve to the present. A glance through almost any 19th-Century American or European newspaper will evidence that although some marketing skills such as advertising copywriting go back a long way, the range and depth of skills required has increased as practice has become more complex and technically sophisticated. Quoting Saren (2011), Cluley et al. (2019) note ‘that “the technical capabilities of IT has far outstripped most marketers’ knowledge and capability to utilize it” (p. 40). In response, there have been calls for marketing educators to shift the curriculum to support practitioners [...] developing technical skills from data science [to] computer programming’ (p. 29).

As a starting point in looking at what marketing might entail today and what might be salient to my pilot study participants as they navigate the current figured world of marketing, I note the work of Di Gregorio et al., (2017) who conducted a study of marketing-related job advertisements across five European countries looking for required skills. Not only does their study point out the sort of skills needed currently but also identifies anticipated demands for the future. For the purposes of this chapter I use their categorizations as a proxy for the sorts of things that marketing work involves today. Di Gregorio et al. (2017) divide marketing skills into five categories, including: ‘basic soft skills’, ‘digital and technical skills’, ‘core marketing skills’, ‘analytical skills’, and ‘customer insights skill’s (pp. 253-254). Basic soft skills are such skills as taking initiative, being flexible, and being able to work well in teams; digital and technical skills include knowledge of various digital marketing and e-commerce functions from search engine optimization to having facility with social media tactics; core marketing skills are those such as planning, sales knowledge, and creative thinking; analytical skills cover the use of statistical techniques, critical thinking and effective reporting; and finally, customer insights skills involve abilities in areas such as marketing research and familiarity with customer relationship management systems (Di Gregorio et al., 2017). Although this is not a final list, these categorizations paint a picture of marketing practice as multi-faceted, and drawing on a mix of both creative and technical abilities, involving communicating, designing, planning, analysing data, researching and organising while being flexible and creative. Of particular interest, Di Gregorio et al note that across a number of dimensions, such as country and level of firm digitalization, soft skills were highly valued everywhere, though as one might expect in more highly digitalized firms, technical skills were more valued than in other types of firms. Moreover, different functional areas within marketing have a different relationship with

digitalization. Whereas it goes without saying that web developers and user experience designers work entirely within the digital domain and could be imagined to be like the proverbial fish that does not realise it is wet, other fields such as sales have licence to be more ambivalent. For example, in a recent survey of salespeople, Alavi and Habel (2021) note a range of positions and issues relating to the digital transformation of sales work:

‘Generally, salespeople hold positive views regarding the potential of new digital sales technologies. 71% of the salespeople in the survey state the new technologies strongly support them in their work. Only a minority of 15% indicated that they disapprove of new sales technology [...] However, concerns regarding job autonomy seem to be much more widespread: 61% have the feeling that they can be monitored to a greater extent through the new sales technologies and 33% indicate that the new tools contribute to their mental exhaustion at the end of a workday’ (p. 84).

Bongers, Schuman and Schmitz (2021) looked at the various ways the digitalization of sales channels in B2B environments affected the work of salespeople and what it meant to them. Various challenges were noted such as increased ability that digital sales channels gave to professional purchasers to optimise price by play in-person and digital channels off against each other and how in some cases salespeople would have to carefully balance their desire to keep buyers away from digital channels while also honouring customer choice (Bongers et al, 2021). On the other hand hybrid digital and in-person selling environments also provided opportunities for salespeople to gain new skill sets and adopt a more consultative, less adversarial approach. (Bongers et al., 2021).

In other words, despite the growth in the sophisticated use of statistical methods and computer technology, at certain levels marketing is still very much about people and how they negotiate their place in a field that is changing rapidly and may often seem more chaotic than organised. Lest marketing seem like an ordered practice defined by standardised digital skill sets, certifications, and logical methods, the evidence points to competing narratives that bump up against each other. Managerialist notions of ‘instrumental reason’ conflict with neoliberal values of ultimate adaptability to the needs of the customer (Svensson, 2004 in Ellis et al., 2011, Ch. 5).

Moreover, large shifts in society ushered in by processes of digitalization, and forces of postmodernity, have fundamentally changed the place of marketers, marketing, consumers and consumption. ‘Instead of separate entities bound by exchange relationships, managers and consumers become partner-players in constructing needs, wants and desires, visions of and for human life, and life meanings. In this partnership, marketing could be distanced or detached from the consumer [...rather...] it becomes a process available to consumers in order to empower and enable them in constructing the realities they intend to experience through construction of communities (Firat and Dholakia, 2006, p. 136).

Firat and Dholakia thus predict that marketing skills will become more widespread throughout various levels of society as marketing becomes ubiquitous, in effect ‘de-professionalizing’ the practice, with ‘everyone [...] required or expected to become informed in marketing know-how’ (2006, p. 152). Marketers may thus be forced to defend against this ‘de-professionalization’ by discursively building up an image ‘as “marketing experts” and members of “marketing

departments”, legitimately able to divide up the market and effectively control relationships’ (Ellis et al., 2011, Ch. 5).

This state of affairs makes it all the more interesting that there has been relatively little academic research about marketer identities to this point. We know a lot about what marketers do and how, but *who* are they? Once again, that is where this project comes in; however, before discussing marketer identities I will quickly provide a further overview of the changing nature of marketing work due the move toward digital marketing, as well as digitalization more generally.

4.4 Digital marketing

For this study, digital marketing may be defined as the attempt to meet marketing goals by utilising digital means; for example, the Internet and related technologies including e-mail, smartphones, and digital assistants such as Amazon’s *Alexa* (Chaffey and Ellis-Chadwick, 2019). Chaffey and Ellis-Chadwick (2019) go on to describe other specific examples of digital marketing practices, such as selling through platforms like Apple’s *App Store*, as well as targeting customers via social media services, all of which collect enormous quantities of behavioural data that may be stored in databases and digested through the use of various analytical techniques. Such developments have led to the near ubiquity of digital marketing channels in advanced economies, causing Lamberton and Stephen (2016) to argue that the historical separation of digital and traditional marketing no longer makes sense.

Unsurprisingly, this changing digital marketing landscape has produced challenges for marketing management (Yadav and Pavlou, 2014; Leeflang et al., 2014). From a purely operational

standpoint, issues such as ensuring firm access to relevant skill sets, adapting organisational structures to the agile, cross-functional, nature of digital marketing, and developing the ability to create “actionable” metrics all seem like obvious targets of managerial focus (Leeflang et al., 2014; Royle and Laing, 2014). From a strategic and organisational standpoint, however, the challenges appear less straightforward, and potentially more difficult, to navigate.

4.5 Theory-praxis gap

Research shows that strong marketing performance management systems lead to improved firm performance and status in the firm (Homburg et al., 2012; Liang et al., 2018; O’Sullivan and Abela, 2007; Stathakopoulos, 1997). At the same time, digital marketing practices are inherently quantifiable, theoretically aiding measurement; however, other studies show that adoption of the most sophisticated, and potentially potent, digital marketing practices are under-utilised, with gaps in what is technologically possible and what practitioners actually do (Quinn et al., 2016). For example, in 2018, despite what popular news reporting about data analytics might lead one to believe, less than 40% of major U.S. firms were using marketing analytics before making strategic decisions (Moorman, 2018), although that number is almost certainly higher today, it is likely still underutilised, particularly among smaller enterprises. Quinn et al. also note that, rather than build capability in-house, many firms have outsourced marketing technology functions; however, it is not fully known if this is happening because of contextual factors or simply ‘limited absorptive capacity’, due to the speed of change (2016, p. 2106). What is known, however, is that given the fluid nature of marketing management environments today, marketing legitimacy seems to remain under continued threat within organisations.

4.6 Marketing legitimacy

Rumours of the demise of the marketing function have populated the literature going back more than two decades. (Possibly) without irony, Whittington and Whipp suggest that, because it has, ‘failed to appreciate and develop its own professional ideology’, marketing is unlikely to ever gain the “respect” that the accounting and financial professions have, arguing that it will have to mimic these functions by ‘adopting more sophisticated, and less accessible, quantitative technologies’ if it hopes to have a future (1992, pp. 52, 60). Rust et al. observe that with other functions having cut costs, the credibility of marketing is being challenged with still deeper reductions in budget, ‘[...] even threaten[ing] marketing’s existence as a distinct capability within the firm’ (2004, p. 76). Likewise, Auh and Merlo (2012) note that, although marketing is seen as an important strategic function, in many firms less marketing work is now carried out by marketing departments. Instead “marketing” activities are now integrated with other core functions such as shipping, as a natural part of the development of strategic capabilities (Hult, 2011). Additionally, in many firms, particularly engineering firms and business-to-business (B2B) firms, the marketing department tends to have a more limited scope of practice, being restricted primarily to marketing communications planning and delivery, while financial decisions and product development decisions are controlled by more senior managers linked to finance and operations (Hanssens and Pauwels, 2016).

Hanssens and Pauwels (2016) also write that many managers do not know how to use data to generate action and struggle with integrating big data, budget allocation analysis, social media and product development, which are all potential growth factors. They suggest there is incoherence between the various measures of marketing effectiveness, with financial,

engagement, and attitudinal metrics often providing contradictory impressions, thereby diluting marketing's influence (Hanssens and Pauwels, 2016). The authors go on to suggest that marketing managers must improve the use of analytics for strategic, as well as tactical, decisions and solidify value metrics; they should also learn to better present marketing results in ways that are relatable to executives according to their individual preference (Hanssens and Pauwels, 2016). Similarly, Lamest and Brady, 'found that unstructured qualitative data had greater visibility and usage once supported by a financial imperative. [They] also found that the use of interactive dashboards were a powerful manifestation of data technology use and increased marketing's visibility, power and accountability within the firm' (2019, p. 104). Such findings align with earlier studies which show that the ability to successfully measure marketing impact, is associated with better firm performance, share performance and the reputation of the marketing function (Gök et al., 2015; O'Sullivan and Abela, 2007; O'Sullivan et al., 2009; O'Sullivan and Butler, 2010).

Despite these challenges to practise, academic research on marketing tends to be dominated by marketing 'science' and consumer behaviour orientations, while strategic management issues, practice disruption and studies about internal marketing reputation receive less attention (Browne et al., 2014; Homburg et al., 2000 and Reibstein et al., 2009 as cited in Quinn et al., 2016; Yadav and Pavlou, 2014). Rational academic marketing talk assumes that it is possible to analyse the business environment in an objective manner; however, because marketing is created by managers in their own environments, it is impossible for textbooks to cover the complexity inherent in real management work (Ardley and Quinn, 2014).

The reality of practice is that it is often far more chaotic and uncertain than textbooks would have one believe; however, Ardley and Quinn (2014) observe that marketers use the language of marketing presented in popular textbooks as a rhetorical device to legitimise the marketing function and maintain influence with senior management. It is therefore likely that marketing managers would use aspects of digital marketing as discursive resources to position their department, and themselves, vis a vis senior executives and competing functions in the organisation. In so doing, marketers would, in effect, self-regulate their identities as ‘appropriate’ managers attuned to the need for measurement and control.

4.7 What is known about marketer identities so far?

Marketing is a field produced by practitioners themselves as much as by ‘the ideas that underpin it’ (Palmer and Ponsonby, 2002 in Woodall and Hiller, 2022, p. 3). Marketers are thus ‘mediators’ within a web of economic and cultural elements which include business, marketing theory, marketing practice and society (Woodall and Hiller, 2022, p. 4). Each of these elements comprise unique figured worlds whose occupants have their own sets of assumptions about what is considered normal. With marketers intertwined with this constellation of intersecting figured worlds it is reasonable to assume that marketer identity work is as potentially complex and multi-faceted as any; however, as noted elsewhere, relatively little robust peer-reviewed research has been published about identity work as performed by workers in marketing-related roles.

Most papers consider identity in specific contexts such as advertising agencies. Lee and Lau (2019), for example, studied how increased use of social media by clients led advertising creative personnel to take on a wider range of tasks and adopt a “solution facilitator” role in addition to their creative role as they dealt with new demands brought on by the cross-functional nature of

contemporary marketing. The result was a need to develop new skills outside their traditional specialist role, leading them to begin to ‘transcend digital/traditional distinctions and which required them to develop new skills and a wider set of professional relationships’ (Lee and Lau, 2018: 154). Lee and Lau’s (2018; 2019) observations are echoed by Patwardhan et al. who note that digitization has led to a need to transition from a ‘service’ to an ‘invention’ role (2019, p. 16). This shift has necessitated skills in negotiating the boundaries between being visionary and being a “manager”; as well as improved collaboration skills (2019, pp. 12, 16).

Hackley and Kover (2007) also studied identity work among advertising creatives; however, in their case the agency served as a source of role conflict and tension when creatives were not adequately socialised into the agency. When unable to deal with the contradictions between creativity and commerce, conflicts arose with the ‘suits’ who increasingly saw the ‘creatives’ as ‘trouble’ (Hackley and Kover, 2007, pp. 71, 74). Gotsi et al., in contrast, found that when design agency creatives were asked to embrace a consulting orientation, the firm was able to resolve identity tensions by separating the two types of work into different times and places, offering creatives ‘a productive form of coping with identity tensions [and] internalizing [a new identity] as “practical artists”’ (2010, p. 800).

As noted earlier, changes brought about by marketing digitalization have also led to the creation of completely new concurrent job functions, potentially creating internal conflict within existing roles. Zimand Sheiner and Earon (2019) note that media planning and management now involves a heavier use of data and analytics. This shift has required the adoption of a more technical

mindset and the rise of new positions for experts in search engine optimization, as well as the need for new skills, such as web analytics, for existing managers.

Continuing with the theme of conflicted identities, Gurrieri (2012) studied coolhunters who struggled to negotiate boundaries between the identity of the “renegade” and the “professional”. These boundaries lie ‘between “internal” ideas and desires and “external” images and evaluations’ (Ellis et al., 2010 in Gurrieri, 2012, p. 800) and, in the case of the coolhunters, led to their leisure time being subsumed by the need to engage in work. Meanwhile this work required them to also appear professional, leading to “slippage” in identities (Gurrieri, 2012).

Ellis and Ybema looked at identity work in marketing managers involved in inter-firm relationships within industrial supply chains and noticed a form of dynamic tension, with managers engaging in an ongoing process of boundary construction between various groups, ‘alternately constructing an inclusive or exclusive “self” vis-a-vis others then stretching or contracting relational boundaries as needed; a process [they] term “tensile discursive positioning”’ (Ellis and Ybema, 2010, pp. 279, 299). This process of tensile discursive positioning ultimately enabled the managers under study to negotiate complex relationships, firm interests, and competitive demands (Ellis and Ybema, 2010).

Ellis and Hopkinson (2010) undertake a detailed discourse analysis of managers and how they use various discursive repertoires to construct “theories” about themselves and the business networks in which they work. The authors show that, because the day to day practice of management takes place within the context of these theories, and because the theories are not

representative of “reality” but only constructions, and because other actors also create their own theories, communication within networks may not proceed as expected (Ellis and Hopkinson, 2010).

In a conference paper, Darmody and Fischer (2011) showed how Irish pub owners across Toronto brought their own consumer identities to bear on the design and running of their pubs and the interactions with customers who combined with the owners to co-create a certain culture and social space which, in-turn, recursively influenced the identity work of the owner. Despite strong stereotypes about what an ‘Irish pub’ should be, much variation across the pubs exists, often evidencing the particular identity enactments of the owners to produce a perceived identity for the business itself (Darmody and Fischer, 2011).

In another conference paper, on a not dissimilar topic, Johnston and Kelly (2018) investigated how marketing and sales professionals draw on a range of identities to help create value for their customers. Their findings evidence the heterogeneity of localised marketer identities aligned with three board themes: professionalism, role orientation, and function and the various extent to which each of these aspects of marketer identity is played out may influence how different marketers either succeed or fail in their attempts to help create value for customers (Johnston and Kelly, 2018).

Turning to the discursive construction of identities, Kong (2001) studied the ways network marketing firms regulate the identities of network marketers through the deployments of complex discourse strategies that use ideas of freedom and control as resources to appeal to

marketer desires for escape from institutional forces in work and other parts of society which are felt to restrict and limit people's wishes for control over who they might become. In reality, however, 'the problems inherent in the network marketing system, such as lack of an effective selection system and sufficient training [...] may produce even more disappointment, helplessness, and fragmentation of individual identities' (Kong, 2001, p. 501).

Continuing the discourse theme, Vachhani (2006) explored the ways in which the identities of salespeople are constructed through discursive strategies of difference and how dichotomous salesperson identities of the calm 'farmer' and aggressive 'hunter' (p. 254) are at once used to create role boundaries and as a resource to construct a contrasting (desired) identity as a sales 'professional', ultimately showing how difference plays a role in both enabling and constraining one's ability to change identities, depending on one's position (Vachhani, 2006, p. 249).

Finally, in a relatively rare quantitative study about identities, Bennet (2010) investigated the factors within a firm that produce marketing professional identity versus an organisationally focused identity in early career marketers. Bennet (2010) shows how different types of mentoring programs, operating styles, and the specificity of training programs, for example "marketing manager" or "generalist manager", contributed to the transition from an identity as a student to one which was either professionally focused or organisationally focused. Importantly, regardless of which orientation was ultimately produced, a strong identity was associated with greater workplace satisfaction, job performance and employee retention (Bennett, 2010).

4.7.1 Marketer identity research themes

In summary, then, the limited literature specifically on marketer identity appears to line up along the following themes. First, there are papers which look at boundaries and how identities are negotiated across them (e.g. Gurrieri, 2012; Ellis and Ybema, 2010) or used as resources themselves (e.g. Vachhani, 2006). Similarly the more general idea of difference also appears as a theme (e.g. Hackley and Kover, 2007; Vachhani, 2006). We also see papers which look at the socially constructed nature of identities (e.g. Darmody and Fischer, 2011; Ellis and Hopkinson, 2010) as well as discursively constructed (e.g. Kong, 2001; Vachhani, 2006). Finally, I noted several papers dealing with the ways in which role changes are implicated in identity work (e.g. Gotsi et al, 2010; Lee and Lau, 2018; 2019; Patwardhan et al, 2019; Simand Sheiner and Eron, 2019). Although each of these papers deals with important and interesting aspects of marketer identity, and other papers mentioned earlier in the chapter discuss the implications of digitalization for *practice*, none of them deal with the implications of the digital transformation of marketing for the identities of marketers.

I thus undertook this pilot study to shed further light on what people working in commercial enterprises and NGOs understand marketing to ‘be’ currently, given their experience of the sort of socio-technical and socio-cultural change currently refiguring the world of marketing, discussed above. I hoped to thereby gain a sense of how this change was implicated in presumptive marketer identity work.

The following Venn diagram (Figure 4-1) situates my pilot study, thematically.

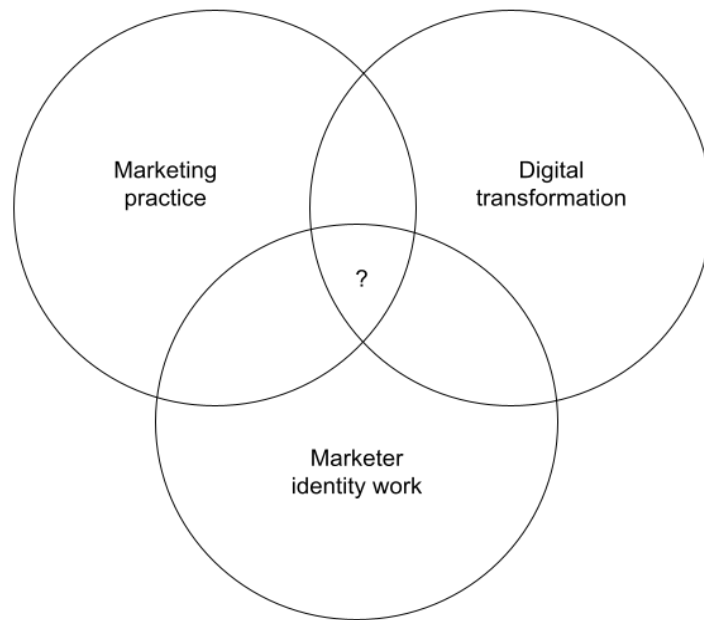


Figure 4-1. Venn Diagram of Proposed Research Themes.
What is going on at the intersection of digital transformation,
marketing practice, and marketer identity work?

The examples of change in marketing practice brought about by digitalization from earlier in this chapter, along with the decision to apply the lens of Figured Worlds theory to the study of marketer identities, invite the exploration of specific questions, such as:

- What are some of the artefacts which shape the master figured world of marketing across a variety of organisations in Canada?
- What are some of the ways that marketing practice is changing and how is this change challenging underlying assumptions and understanding which define the figured world of marketing, if at all?

- How do marketers construct their work identities in the face of changes to the master figured world of marketing?
- What are some of the identities that marketing managers construct because of the increasingly cross-functional nature of marketing in the firm?

By exploring questions such as these I hoped to get a sense of where to focus my main study.

The next section of this paper discusses some of the methods I used in this pilot study.

4.8 Pilot study methods

4.8.1 The search for artefacts and assumptions

Given that my pilot study would take the form of a qualitative exploratory investigation, I adopted a Pragmatist orientation as noted in the last chapter. Pragmatists acknowledge the external reality of social phenomena, which arise through events, however meaning is argued to emerge through interaction with others and reflection on what we think will happen next as a result of those phenomena (Jenkins, 2014; Kelemen and Rumens, 2012; Simpson, 2009; Watson, 2017). Discourses further serve as ‘device[s] which help [people] deal with the level of social reality that mediates between that of *culture* at the relatively “macro” level and the social interactions and interpretive actions of individuals and groups at the more “micro” level’ (Watson, 2017, Ch. 3 under *Sociology, discourses and working lives*). Identity is thus also fundamentally about recognition, a position that aligns with the Figured Worlds view that identity is something that comes out of being a certain kind of someone according to how one is ‘figured’ in a figured world through the actions and artefacts that constitute that figured world.

Figured worlds and the identities that they define are thus seen to be co-constructions. One has agency but that agency may be constrained to a greater or lesser degree by how people are positioned within figured worlds, a dynamic that defines the ‘space of authoring’ available to people to use their agency in constructing their identities (Holland et al., 1998). The questions of whether, and how, digital transformation is involved in the identity work and identity regulation of marketers, as they negotiate a place for themselves in a changing marketing environment, therefore necessitates that one get a sense of what marketers understand to be normal ways of being in the changing world of marketing. I will next discuss how I set about getting some preliminary answers to these questions.

4.8.2 Pilot study design

4.8.2.1 Exploratory interviews and thematic analysis

Given the scant prior literature on the impacts of digitalization on marketer identity work, I elected to carry out my pilot study using an exploratory design which incorporated semi-structured interviews and inductive thematic analysis (O’Gorman et al., 2015). As I will detail in a later section I also conducted discourse analysis of interview transcripts using Gee’s ‘figured world’s tool’ (Gee, 2014b)

A purposive sample of 17 marketers from across Canada was recruited through referrals from my professional network with an attempt made to include people from a variety of geographical locations and industries, although the single largest number of participants (four) came from a single Toronto-based events management company, while another three were from the same

agricultural machinery manufacturer. Two participants worked in non-governmental organisations, while the rest came from the pharmaceutical, banking, hospitality, retail, industrial supply, and agribusiness sectors. The goal was to identify salient identity issues for marketers along with the major discourses and artefacts which compose the master figured world of contemporary marketing practice, investigate identity work around the practice of digital marketing management in a variety of settings, then use the results to focus the second phase of my study. About half of the participants shared the experience of leading teams in mid-to-large organisations, while all had enough experience in the field to have used traditional non-digital marketing tactics, as well as participate in the introduction of at least one new digital marketing practice within their organisation. Although the sample was relatively small, I suggest that because all participants shared the common characteristic of implementing, or at least experiencing, a new digital marketing practice, while at the same time coming from a diverse range of industries, I was able to generate believable exploratory insights about how marketers in the Canadian context engage in identity work around their experiences of the digitalization of marketing. Such purposive ‘sampling’ is generally seen as a suitable way to design small-scale exploratory research studies (Denscombe, 2014). Table 4-1 provides an overview of the study participants.

Table 4-1. Pilot study participants

| Participant | Age | Role | Field | Representative Quote |
|--------------------|------------|------------------------------|-------------------------------------|--|
| Evan | Early 60s | Senior Director of Marketing | NGO | <i>It just kept evolving and escalating to a point where at one time I was able to do everything photography writing website construction, to a place where again it became very specialised / I don't think that it will ever lean too far towards the data side because you're only going to generate good data if you've got a good story. I'm now drawn away from marketing. I'm starting to view it as an evil. Where I see it headed is the strategic use of information gathered without my permission.</i> |
| Connie | 40s | Director of Communications | Pharmaceuticals | <i>The people that I had a chance to meet over the years [are] people that specialise in one facet. I love drawing on their experience and knowing that that's what they specialise in and I can then use them as a mentor or consultant for things that I need to do in my day to day work.</i> |
| Winnie | 40s | Marketing Director | NGO | <i>We had to make some internal changes in the way that we operate in our finance and billing system so that we can run ads on Facebook, like the entire world.</i> |
| Jules | 20s | Email programmer | Events Management | <i>I started as a web developer. This was just something that happened yesterday. I'm not a writer. I'm not a designer. And she told me to whom we're trying to send the email [but] am I supposed to design that? Well, like everything else that comes to me my job is designed from the client perspective. And they have like an example. Here is what I want to tell, can you replicate it? And I will replicate it to the best of my ability. I make what they want. We run into [this] consistently. We don't have access to the design team. Half the time I can't even get them to go look up an image on Getty Images and then I'll program it. So like, they couldn't be bothered they're too swamped [designing displays] to do something like that.</i> |
| Greg | 50s | Operations Manager | Agronomy Services | <i>To me Google is amazing. As a company and a technology. So being Agile is about having the information and data you need to make decisions without any barriers. And we use Teams and I meet with anyone any time. I can have a quick chat and keep things moving plus save money on travel.</i> |
| Serena | 30s | Consumer Marketing Manager | Events Management | <i>We started on Slack but that is what the app developers used and they kept it to themselves and I was the only member of the marketing team allowed on there, then with covid everybody was put on Teams and some silos came down but still I am doing things like writing copy and that is not my background but I run it by Debra our marketing director and chat apps make it easy to just quickly try out ideas with other people.</i> |
| Liam | 30s | Business Analyst | National consumer products retailer | <i>The whole concept of scrum and agile is to get that feedback quickly, right? That performance, right? So you want to win at least as often as you fail, and you want to fail fast. If you put that 300 page requirements document together and the team spent two years building and its crap basically you failed for two years and didn't even know it.</i> |

| | | | | |
|---------|-----------|-----------------------------|---|---|
| Hanna | 40s | Customer Engagement Officer | Multinational Life Sciences company | <i>The hardest part for us as marketers is there was always this promise of digital doesn't cost anything to send out emails digital free free to do it, but it's not free because now you just have more channels because they're still going to trade shows, they're still reading Western Producer and they're going to Facebook and twitter and instagram and they're doing all the stuff. So it's now just a great proliferation of channels and ways for you to reach the customer in ways where you need to be visible right so that really makes it a lot tougher.</i> |
| Barry | 50s | Vice President of Marketing | National Hotel Chain | <i>Everybody today, I would say, everyone's a marketer. The finance people are marketers. Back halfway through my 29 years I define the finance people as they were the caretakers they presented you with all the financial sheets. That's all they did. Now there's CMA, CPA. You see the ads on TV saying, "exciting career...making the moon". Well, okay, but we're doing that too like, it's just it's interesting. Right. So everybody has a part of marketing, which is fine but it's just in my view, in my experience, it wasn't always that way. You know it would be like taking your master's of marketing communications and you'll get to do the quarterly report.</i> |
| Tilly | 40s | Brand Strategist | Chartered Bank | <i>I've been working in this industry for over 20 years and I've seen the emergence of new I guess new digital media and ways to reach, you know, different audiences and it's becoming quite overwhelming because the situation that we're in is that we have so many channels yet the same amount of people to manage now so that's definitely the challenge that I'm in is the emergence of, you know, these new channels but still trying to keep up right? You need different expertise. IT might not see everything through a marketing lens but the expertise they bring to the table is just as important as marketing to me.</i> |
| Stanley | Early 60s | Marketing Manager | International Farm Machinery Manufacturer | <i>Marketing creates the interest and the desire and provides the tools to the sales people to make the sale. But there's more demand for metrics and quantifying of things than there was in the past. The bean counters, the major executive guys they have to make decisions and it comes right all the way down the chain and these guys know it's working or not, and so we should give them we give them the resources the tools they need to continue down this road if it's working.</i> |
| Cass | 20s | Web marketing specialist | International Farm Machinery Manufacturer | <i>If I [advertise] online, it's like how many people visit that page? What did people do on that page? How long were they on that page? How much do you spend? You know how many people saw it and clicked. Like it's you can you can narrow it down so those numbers should be there. So I feel like I can't call myself a marketer until I know what my metrics are like what I should be proving.</i> |
| Yannick | 20s | Graphic Designer | International Farm Machinery Manufacturer | <i>I think sometimes it's our own curiosity as well like it's nice to have the data so that you can prove what you're doing is working. But in the same sense it's like us, pushing for it as well, like it's not just "okay you have to do this now..." I think, like, Oh, I'm kind of curious to see where this is going.</i> |

| | | | | |
|--------|-----|------------------------|---|---|
| Teri | 40s | Sales Representative | Facility maintenance supplies and equipment | <i>With IT they're internal right? Their world is internal. My world is external. Yeah. That's a big reason. Like you said it like I in order for me to make business happen, I can't go on to an app. I'm not going to text to my clients. I just won't. You know, I don't find that professional. And, you know, if you're asking for money, the least I can do is give you a call if I can't come to you, which is the problem for a lot of reps in this world we live in.</i> |
| Vic | 30s | Web designer | Agriculture technology company | <i>Thankfully we really use Teams in a big way. Right, and I can tell you, so here I am at home, sitting in my office in Calgary but I have a pretty good idea of what's happening and when it begun and the other teams all over Canada and even in real time in Israel because I can I can watch the conversations happening, anything that I need to jump in on I can. Teams is you know, is a real godsend it does everything exactly how I want it to be in terms of the communication and being able to eyeball conversations. You would have to pry it from my cold dead fingers, haha.</i> |
| Dennis | 40s | Graphic Designer | Events Management | <i>Sometimes it gets a little bit overwhelming. We have been over the past little while, you know, there's more and more people that are involved in the company, as far as, you know, needing stuff. So what we have now it's like, you know, this, this sort of stable of people in admin positions or marketing positions, or sales positions, or whatever, and all of those people have a direct line to, to me or to somebody in the department. So we have more and more and more people that are looking for more stuff. And sometimes it would be, you know, it would be great if there was a person in charge of connecting the marketing and sales.</i> |
| Susan | 30s | Marketing Co-ordinator | Events Management | <i>So it gave me the opportunity to see both sides because I have just enough technical knowledge to listen to what IT was saying and translate that for Debra, because she doesn't understand it or like it. And then that way, with Colin and Debra we sat in two days of meetings, I literally functioned as a translator between the two. So it was like, sort of seeing IT people speak and then translating into like normal humans speak and then what that means for somebody who's using this product. So that's sort of my role as well working as the in-between for that.</i> |

4.9 Empirical work

Empirical material was generated through semi-structured interviews. Semi-structured interviews are suitable for exploratory research as they are at once systematic yet offer enough latitude to

both researcher and participant to steer the conversation toward more contextually significant lines of questioning (Denscombe, 2014). All interviews were either held in neutral locations, rather than at the worksite, or by telephone, to encourage participants to talk freely. The use of mixed interview channels was not deemed to be of concern as the focus of this phase of the study is on the identification of discursive resources and understandings of practice, rather than dramaturgical practices of identity construction. 14 participants were interviewed one-to-one, while the remaining three were interviewed as a group. In the case of the group interview, additional latitude was given to participants to engage in conversation with each other for potentially more relevant issues to emerge through the co-construction and testing of identities (Purchase et al., 2017).

Interviews began by asking participants to tell me ‘what they do’ in their organisation and how they arrived at their position. I then asked for their views on what they thought marketing is all about. If they had not already mentioned a significant experience of digitalization in their work, I asked participants to think of a time when they experienced such a change in their work. During this phase of the interviews I attempted to adopt an approach to questioning that incorporated Pragmatist views of identity formation and human action to help get at the meaning of change to practice for the participants as based on anticipated outcomes or the consequences of change (Lorino, 2018; Simpson, 2009). Therefore interviews were partially structured around the ideas of changes in the world, (*What happened?*); interpretation (*What did you think about that?*); and agency (*What did you do then?*).

All interviews were audio recorded and lasted between 35 and 90 minutes, then transcribed. Transcriptions were then double-checked against the original recordings in preparation for analysis, though preliminary observations were noted during the transcription and verification rounds (Belk et al., 2012).

4.10 Interim analysis

As already mentioned, the initial goal was to identify the various artefacts that defined the figured world of marketing for participants and how they were used as resources for identity work. The ways that people construct identities through local talk operating within the confines of larger “normative discourses” was also considered (Alvesson and Willmott, 2002). Such discourses provide structure to an organisation and inform ideas about “acceptable” or “ideal” identities within an organisation (Alvesson and Willmott, 2002; Ardley and Quinn, 2014; Ellis et al., 2012), in effect serving to ‘regulate’ worker identities (Kuhn, 2006: 1341).

In line with a Pragmatist epistemology, my approach to analysis was interpretive and constructionist (Watson, 2017); acknowledging that the discussions I had with participants were only partially accurate ‘accounts’ of phenomena but also performances of how participants may have thought they ‘should’ present themselves to a researcher. Following Belk et al. (2012), coding was informed by relevant prior literature about digitalization of marketing cited in Chapter 2 as well as by observations emerging directly from the transcripts. Such a hybrid deductive-inductive approach to analysis can display greater rigour (Fereday and Muir-Cochrane, 2006) and effects a form of abductive analysis which is a defining characteristic of Pragmatism (Simpson, 2018). The interviews were analysed case by case, reading each transcript and noting

potential discursive resources that arose inductively. This procedure was repeated while looking for discursive resources that were informed by theoretical and practitioner literature. Finally, the transcripts and annotations from earlier rounds of coding were analysed on a cross-case basis with the goal of looking for patterns across the interviews (Miles et al., 2020), then tagged to a set of themes consisting of inferred normative discourses and artefacts used as discursive resources.

After completing the initial thematic analysis, I returned to the transcripts and, using James Gee's 'figured worlds tool', to consider: *'What must [the] speaker assume about the world -- take to be typical or normal -- to have spoken this way, to say these things in the way they were said?* (2014b, Ch. 4.9 Para. 1). According to Gee, interviews are a good strategy for studying figured worlds (2014b). The tool lends itself to subsequent follow-up in participant observation to see if one's theories about what is assumed about the world in the interviews plays out in situ. In the case of this pilot study, however, no participant observation was carried out after the interviews and rounds of discourse analysis since the pilot was initially purely exploratory. I will return to Gee's figured worlds tool in later chapters.

4.10.1 Themes, artefacts, and resources

After analysing my interview transcripts, a number of themes came to light. Although the various participants held a range of opinions on the general positive or negative consequences of digitalization, these are not of specific interest to me at this time. Instead I will report on some of the key themes which eventually played a role in choosing the direction of my main case research, including concepts such as: *difference, instrumental rationality,*

expertise/specialisation, overwhelming and *platformization*. I will next address each theme individually, highlighting salient identity artefacts from interview excerpts, then working backwards using Gee's (2014b) figured worlds tool to discern what selected participants likely consider to be normal within the figured world of contemporary marketing and what these assumptions might mean for their identities.

4.10.1.1 Difference

Boundary building, naming, and identifying the 'other' are all well documented practices in the construction and regulation of group identity (Ybema, Vroemisse & Van Marrewijk, 2012). When new situations or people appear, members of groups may be disciplined into seeing 'difference', rather than being allowed to decide for themselves what to think about the new. Difference may be imputed on others or bestowed on the group itself depending on whether value is placed on being normative or radical, in a given circumstance (Ybema et al., 2012). Difference may be called out in reference to individuals or groups, to ways of doing things or as Mead (1934) put it, in relation to a 'generalized other'. Moreover, marketing is inherently involved in producing distinctions, serving to maintain the foundational myth of neoclassical economics that economies are fundamentally composed of rational individuals solely acting in order to maximise self interest (Benton, 1987). Unsurprisingly, interviews produced many examples of othering and discourses of difference. Labels such as 'internal people' versus 'external people', 'millennial colleagues' versus 'I'm the old one here', 'senior management' over against 'the rest of us', and distinguishing one's own team from members of other teams such as 'the bean counters', and 'the sales guys [sic]' were common across all interviews. In the case of some participants, however, differences were becoming blurred and role confusion was

beginning to emerge. Jules, an e-mail programmer at an events management company, offers a prime example in this lengthy excerpt:

To my mind, the biggest thing that we run into right now, is there's no access to creative resources for marketing. And there's no like overall or articulated marketing strategy that would allow for planning. We're just supposed to respond. So, just as an example, Serena, [our] consumer marketing manager, wants to do behaviorally targeted marketing, you know, right, in which case, you know, we send to the GTA [Greater Toronto Area] 25-34 [year old] audience and then you know, we're supposed to send three different email versions and track click rate, and see which one gets customers engaged and then adjust our message based on that but I'm having to create it. But I started as a web developer. This was just something that happened yesterday. I'm not a writer. I'm not a designer. And she told me to whom we're trying to send the email [but] am I supposed to design that? Well, like everything else that comes to me my job is designed from the client perspective. And they have like an example. Here is what I want, can you replicate it? And I will replicate it to the best of my ability. I make what they want. We run into [this] consistently. We don't have access to the design team. Half the time I can't even get them to go look up an image on Getty Images and then I'll program it. So like, they couldn't be bothered they're too swamped [designing displays] to do something like that.

Here Jules is torn between othering the designers and the consumer marketing manager but in the end ‘...make[s] what they want’. Resource constraints have directed him into roles (writing,

designing) that are technically outside of his area of expertise, but he is ‘...just supposed to respond’ which he does ‘to the best of [his] ability’.

Considering Jules’ account from a figured world’s perspective, and what must be the case for him to have said what he did, we can infer several underlying assumptions. First, the organisation has adopted the idea of being responsive and flexible as normative. Long term planning has been replaced by ‘responding’ and ‘tracking’ and testing. A second inference may be made about power relationships. At Jules’ workplace, the creative staff are focused on display design [likely seen as core to the company] and ‘couldn’t be bothered’ to work on his e-mails. Jules is thus forced to live by his ethic of responsive customer service, doing what is asked of him. He “make[s] what ‘they’ want. As Mowles puts it:

‘In most organizations different departments have varied reputations: the marketing department might develop a heroic “we” identity in relation to those working in sales, for example. Gossip, strong affect, and the development of identity are the everyday currencies of organizational life simply because we are interdependent members of different, fluctuating groups’ (2015, P. 253).

4.10.1.2 Instrumental rationality

Thanks to the borrowing of discourses from the worlds of neoclassical economics (Svensson, 2007), the discipline of marketing has long seen itself as a rational ‘scientific’ exercise (Ellis et al, 2011). Svensson (2007) notes how the rise of the ‘marketing management approach’ in Western economies after World War II emerged as a tool for decision making in a society which was newly overwhelmed by consumer choice. Ideas which have flowed from this approach such

as ‘market segmentation’ and ‘positioning’ are now found as a matter of course in marketing textbooks and shape normative ideas of what marketing is all about (Svensson, 2007), including the need for increased measurement and the extensive use of appropriate Key Performance Indicators (KPIs) (E.g. Rust et al., 2004; Saura, Palos-Sánchez & Cerdá Suárez 2017). Ultimately Such ideas construct a domain and a claimed area of expertise (more below) which justifies the marketer’s position in organisations (Ardley & Quinn, 2014; Ellis et al., 2011; Hackley, 1999).

A sense of the significance of digital marketing practices as being data-driven, and therefore measurable, and rational, was frequently highlighted by participants as giving them the ability to demonstrate the value of their work. Such views were evidenced by statements like the one below (highlighted in Chapter 1) from Cass, a digital marketing specialist at a farm machinery company under new (now publicly traded) ownership

“For me it’s like because they [senior executives] know that if those digital metrics exist and they can be shown then they should be shown, like if we’re doing a print ad and we’re running it in a magazine, it’s like, well, this publication gave us this number of readers. Great and we spent this much money. If I do that online, it’s like how many people visit that page? What did people do on that page? How long were they on that page? How much do you spend? You know how many people saw it and clicked. Like it’s you can you can narrow it down so those numbers should be there. So I feel like I can’t call myself a marketer until I know what my metrics are like what I should be proving and that is different from the other way, yeah.”

The above statement exemplifies the thoughts and feelings of a marketer facing changes to the way she practices marketing, and how such change affects the way she thinks about herself as a marketer; in this case, while being accountable to new senior management with greater interest in metrics than was the previous ownership. This example links together the ideas of legitimacy and expertise as one constructing the other. One literally cannot call oneself a marketer unless they are managing through measurement. Content becomes secondary and has value only so far as it can be measured.

Claims of special expertise is nothing new or unique to the marketing domain; however, it is seen as more and more important in justifying the existence of the field as a separate function within firms (Ardley and Quinn, 2014; Brownlie and Saren, 1997; Quinn et al., 2016).

4.10.1.3 specialisation

A key assertion made in this thesis is that the increasing specialisation of roles within the marketing function due to digital transformation (E.g. Cluley et al., 2020; Di Gregorio et al., 2019; Quinn et al., 2016; Singh et al., 2019) has had an effect on marketer identity among practitioners. Although there is some antecedent literature, noted earlier, to support my argument, and there is similar literature in other fields which does address the identity implications of role specialisation (E.g. Ashforth and Kreiner, 2014) I hoped my pilot study would help me understand some of the specialist artefacts involved in such identity work.

Evan, a senior marketing director close to retirement from an NGO, suggested that specialisation has changed the fundamental nature of work and who it is possible to see oneself as being:

Researcher: So how did that make you feel as a professional communicator working away over the years and suddenly, I can't do this all by myself anymore?

Evan: Overwhelmed, absolutely overwhelmed because I've been used to doing it all myself and it moved more slowly before so I could take the time to take a course and learn it but suddenly the rate of acceleration, the pace of it. And I should say we also work with some contractors and freelancers, in addition to the in house, it's gotten so specialised. The e-commerce part we've had to contract that out.

Researcher: So would it be fair to say that your work in some ways has become less of a creative role and more of a managing role

Evan: Correct, it's become more of an administration job and less of a content production job.

Researcher: So how does that make you feel in terms of your identity as a marketer?

Evan: I feel like I'm doing more management and yeah, I miss some of the creative stuff, but at the same time I also realise that I don't have time to wait around for free exploration. It has to happen right now, or better yet yesterday.

Researcher: What do you think drives that pace of change?

Evan: Partly upper management, partly the audience. The audience can be very demanding.

Researcher: Are you saying the audience has a certain amount of control now?

Evan: Influence more, rather than control. I'd say influence. So our first few videos were okay but it became clear to me that with the younger audience they had hollywood expectations. Meanwhile YouTube and Google and Facebook have evolved into these giant companies that just want to get my information without my permission. They have the control.

Although specialisation is nothing new, what is salient for Evan is not that there is so much new to learn, he was always interested in learning through courses, for example, but that specialisation has led to a loss of control, to some extent. Specialisation is driven by the performance demands of both upper management and the audience and, critically, by the platforms themselves. Meanwhile the marketing manager is left dependent on the specialised skills of what have become individual technicians, a shift which has had major identity implications for Evan.

Paralleling Evan, Winnie, the marketing director at a national cultural institution, discussed how

digital structures have influenced how her organisation works and has led to further specialisation:

Researcher: Can you think of an example where your experience of adopting new marketing media channels would have changed the way you work and operate?

Winnie: Shortly after I started as part of my initial review of the marketing here I needed to determine how much money we spent on Facebook advertising. And so I went and worked with our finance department and I was like, we actually haven't spent any money on Facebook ads and so I was like, well, why? I was completely taken aback by that. So I sat down with the marketing [manager] and we talked about it and they were like, this was someone who doesn't come from the digital world [who] comes from traditional media and she was like, I don't even know how I could buy a Facebook ad with our purchasing system because we pay based on a purchase order and then you send me a tear sheet, like it was this arcane system so we immediately partnered with a media buyer to buy our digital through them so that we can start doing Facebook and stuff and they can invoice us but even then, creating the purchase in our system, it didn't work right so we had to make some internal changes in the way that we operate in our finance and billing system so that we can run ads on Facebook, like the entire world.

Here a marketing director wanted to advertise 'like the entire world'; however, institutional

factors were in the way. On the one hand this example illustrates what a normative analysis would label the structural pole of the so-called structure-agency divide. From a pragmatist/sociocultural practice perspective, however, we see the impact of Facebook as a mediator or cultural tool in Winnie's construction of her identity, along with other mediators such as payment systems and specialist roles i.e. media buyers. In Winnie's master figured world of marketing the answer to the question, 'what would have to be the case in order for this person to say what they said?' is that Facebook has become a default marketing channel. Indeed with Google, Alibaba, Facebook, and Amazon now commanding over 66% of global online advertising (Statista, 2022a), it has arguably become the case that Facebook is simply now an established artefact of 'marketing' per se. In Winnie's world, it seems that to call oneself a marketer one must be on Facebook.

4.10.1.4 'It's all good'

Connie, communications specialist at a pharmaceutical company, took a position somewhere between that of Evan and Winnie. Although the pace of change away from traditional marketing channels to digital channels such as social media and email has proved challenging, she found the shift to more specialisation has given her *more* control, not less.

Researcher: How do you feel about how much control you have over your role as a marketer as a result of these shifts?

Connie: I think you have to evolve with it. There is definitely room for more of those specialised consultants and things like that. So even just the way looking

back 15 years ago, I would have been kind of a jack of all trades having a little bit to do about everything, where now it's like a specific social media consultant that is their realm and it works, for kind of the insights they provide, to pay them to do that, and building a digital department that a couple years ago with maybe had one or two people to depending on a company size to like ten plus, with just all the different things that are happening. So I think it's just something that as long as you're willing to, not put your head in the sand and say that's just a fad or a trend to be accepting of it, even though you don't need to understand every element like I never learned to write code and I never plan to but there are those people that do and they're very good at it and you can you can move on that way. But that's definitely something I'm happy I've been around, like I said, the people that I had a chance to meet over the years people that specialise in one facet, I love drawing on their experience and knowing that that's what they specialise in and I can then use them as a mentor or consultant for things that I need to do in my day to day work. I'll say at this point, also, I really appreciate automation. I know just being introduced to HubSpot it's just become a lot easier in connecting with our customers on a more frequent basis. I think it feeds all back into that metric again. We could have sent out emails just from a general Outlook before and you don't really know where it goes from there unless you got to anyone undeliverable and it bounced back. We never really knew, even if it went somewhere. And what's nice about Hubspot, too, is just the ability like we send out letters and they're never longer than kind of one scroll thinking most people are looking at it on their phone or a tablet kind of thing, but then it links back to

our web page. So again, it's just another nice piece that ties into that larger campaign back to your site.

For Connie she sees digitalization as just one more development in the evolving practice of marketing and to be successful one simply has to embrace change rather than avoid it. Automation, in particular, is seen by Connie as a development that has made her a better marketer. To Connie, marketing is changing for the better so why would one not want to embrace it?

4.10.1.5 Mediation means are contextual

Connie feels empowered by digital marketing technology, while Evan feels confused. Connie uses a digital marketing tool, HubSpot, to feel like she can get the right message to customers and use metrics to improve, while Evan feels that platforms such as YouTube have created a context where others are in the driver's seat. Mediation means or artefacts are interdiscursive and rooted in a historical trajectory (Scollon, 2001). Evan, Winnie, and Connie all bring their own histories, discourses and interpretations to the changing world of marketing work. The identities are contingent not only on the specific affordances and constraints of the artefacts used in their enactment and construction but also the specific spaces of authoring in which they occur. In Connie's case she works in a for-profit multinational pharmaceutical company and is mid-career, while in Evan's case he works in an NGO and is planning to retire. Were there specific aspects of these contexts that were more or less important as mediators than the software itself? How about the individual spaces of authoring (Holland et al., 1998)? Later, in Chapter 9, I shall analyse the role that a software platform played in the transformation or re-figuring of a

certain type of figured world; however, for now I will summarise my pilot study results and their implications for the design of my main study before moving on to Chapter 5 where I discuss the case site where I undertook the bulk of the empirical research informing this thesis.

4.10.1.6 Platformization

Nearly every participant in the pilot study made mention of the role that some digital platform played in the management of their work. These ranged from social media marketing channels such as Facebook, YouTube, and Instagram to project management tools such as Basecamp and team communication platforms such as Slack and Microsoft Teams. Almost every aspect of digital marketing work is mediated by some form of platform which is used to communicate with customers or colleagues and organise resources across work teams. While Evan and Connie had contrasting views on the benefits of the platforms they were using, and Winnie saw Facebook as a sort of fact of life, as already noted above, Vic, a web designer, had arguably the strongest views.

Thankfully we really use Teams in a big way, right? And I can tell you, so here I am at home, sitting in my office in Calgary but I have a pretty good idea of what's happening and when it began with the other teams all over Canada and even in real time in Israel because I can watch the conversations happening, anything that I need to jump in on I can. Teams is you know, is a real godsend it does everything exactly how I want it to be in terms of the communication and being able to eyeball conversations. You would have to pry it from my cold dead fingers, haha.

Platforms will return in detail in Chapter 9, so I will not address them further here except to mention that they are fundamental to the digital transformation of marketing and their implementation offers an important nexus of activity where empirical work can be undertaken to help explain processes of identity work among contemporary marketing practitioners.

4. 11 Discussion and Conclusion

This pilot study identified a number of themes which I used to organize salient discursive resources used by marketers in their identity work around the digitalization of marketing practice. Echoing other studies (E.g. Lee & Lau, 2018; 2019; Patwardhan et al., 2019; Zimand Sheiner & Earon, 2019) digitalization clearly has identity work implications for marketing workers. My interviews evidenced examples of many discursive resources such as e-mail marketing software (E.g. Hubspot), social media platforms (E.g. Facebook and YouTube), measurement, KPI's, role specialisation (E.g. media buying), and the pace of change which participants used to position themselves as certain kinds of marketers and author their identities as marketers. Tying all of these resources together is the idea of legitimization, or thought of in terms of figured worlds, there are certain underlying assumptions which define what it means to be a 'normal' marketing practitioner in the now ubiquitous world of digital(ized) marketing. This is a world in which marketers are flexible, adaptable, experts who embrace metrics to manage performance and demonstrate accountability to upper management and customers (or the audience). In essence these are not really different qualities than have traditionally been sought in marketers, or any employees, for that matter; however, the specific resources have changed. Meanwhile the situated nature of the identity work was highlighted, arising from local details, including in some cases which counter the idea of over-specialisation. For example, although

people such as Connie and Evan spoke about how they are no longer able to do everything themselves, Jules related how because the creative team at his events management company was focused on designing core offerings and ignored his pleas, as a junior technical staffer he was being called on to write copy and design email layouts outside of his usual comfort zone. In line with Figured Worlds theory, localised meanings and power relations circumscribe what sorts of marketer it is possible to be in this evolving world.

The conflicting possibilities illustrated by my pilot study indicated that the interesting 'stuff' was in the local details. Consequently the project confirmed for me that the best approach to understanding how digitalization of marketing practice was involved in constructing marketer identities would involve the use of multiple methods such as participant observation, interviews, and multimodal analysis of discourse in practice brought together in an ethnographic-style whole (Humphreys & Watson, 2009; Watson, 2011).

Moreover the pilot also pointed toward studying a setting where the change was significant and underway. In the case of my interviews that seemed to be happening in a more dramatic way in the examples from the non-profit sector. In each case there were shifts in both practices and orientation which produced more multi-dimensional change. An NGO would therefore possibly offer the potential to observe more concerted identity work or perhaps more visible expressions of resistance to, or appropriation of, new mediational means than in a for-profit entity where the underlying assumptions about the nature of marketing may not have been challenged as much.

Considering the above factors I thus sought out an NGO setting for the case study at the centre of this thesis. The next chapter details the process I followed to locate and gain access to my case study site. I also provide a detailed discussion of the site, itself along with a sense of the historical trajectory of the organisation before moving on to Chapter 6 where I begin to detail the various classes of marketer identities evidenced in my case site.

Chapter 5. Case Study Site

5.1 Introduction

As mentioned in the last chapter, indications from my pilot study seemed to suggest that a non-profit setting might be one in which the digital transformation of marketing could lead to more multi-dimensional and perhaps significant change than in a medium or large for-profit business since the commercial enterprises all seemed further down the path of digital transformation. I thus sought out an NGO as my first choice of case site for my main study.

Fortunately, I was able to draw on a network of contacts from earlier in my career in the non-profit sector and thereby approach a number of organisations as potential case sites, eventually locating one with the following characteristics and advantages:

- National in scope (therefore of sufficient size to have a large dedicated marketing department of more than a dozen staff out of a total of about 100 employees)
- Some indirect links (through former colleagues) which would engender trust in me as a researcher (I would be seen as 'safe' rather than as a potentially threatening presence from a business school)
- Relatively recent restructuring of the management team and marketing function which meant that there was good potential for continued change and presence of significant identity work resources for marketers

- Existing links to local universities and therefore a comfort level with the presence of social science researchers. As my primary contact in the organisation (introduced later) said, ‘Oh we have researchers in here all the time. We’re used to it.’
- A marketing department which was using contemporary digital marketing tools and techniques as well as traditional non-digital channels so that processes of change would continue to be ongoing while I was present.

I was fortunate to gain access to such a site. I suspect my being older than most PhD students, coupled with my lengthier experience in marketing, contributed to being able to gain access to the organisation that I studied. A younger researcher new to approaching senior managers in larger organisations may not have known what to do, or may have had to work harder, to gain the trust of executives in the organisation and thus not have been afforded the same level of access that I enjoyed. Also, as it turns out, one of the managers in the marketing department was raised in England and so was familiar with Durham University and found it interesting that I was conducting research at a Canadian NGO. Points of shared interest such as this proved helpful in also gaining the trust of the more junior research participants and quickly blending in with the surroundings and eventually being offered some fairly candid opinions from participants at times.

This naturally raises the issue of protecting the privacy of participants, which was of course promised when obtaining their consent for interviews and note taking while observing various activities. It goes without saying that the names and job titles of participants have been changed; but, also in some cases so have the genders. In one case, following Watson’s (2011) advice, a

'participant' is a composite of several people. This was done to protect individuals, one of whom still remains with the organisation. This approach, would be considered unusual in a positivist paradigm, where the goal is to 'accurately' report on what is claimed to be objective reality; however, when writing interpretively in an ethnographic style, the goal is instead to present material that is truthful, or true to the essence of what was going on in a given situation, thereby still presenting useful knowledge (Watson, 2011). To *not* do so would not only be unethical and potentially harmful to individuals who agreed to participate in good faith, it would also do little to enhance trust between myself and the organisation, should I ever wish to approach it about future research projects. With these points in mind, I will next provide an outline of the rest of the chapter.

Following this introduction, I lay out the history and physical characteristics of the site, followed by an outline of the internal structure of the organisation and brief biographies of the people who participated in the study. I will then discuss how these characteristics impacted my final research approach and how it evolved to take advantage of developments at the case site while I was there. Finally I will close with a summary of the chapter in preparation for Chapter 6, my first empirical chapter based on my main study site..

5.2 Introducing Canango

The organisation which I studied for this research is a Canadian NGO (Canango) with a history dating back more than 50 years. Canango is focussed on addressing a number of social challenges such as unemployment, lack of marketable skills, housing, and education. Canango began as a grassroots, volunteer-led, organisation and operated this way for much of its history;

however, like many contemporary NGOs its operations have professionalised over the last two decades and this has accelerated in the last five years with a generational change in management. Previously Canango's leadership team had come from frontline community work with a gradual shift to management whose prior work experience was primarily in the for-profit sector. Several current executives have MBAs or professional accounting designations or worked in technical roles in major financial institutions before joining Canango. This change has been seen as positive by funding sources even though it has not been universally appreciated by program staff. Canango continues to undergo a shift in culture and therefore provides a good site to study through the lens of Figured Worlds theory.

Canango is centrally located in an economically stressed area of a large Canadian city. Most of the buildings that surround Canango are old and in varying states of repair. Canango's offices, in contrast, are new and state of the art, built as part of a larger urban revitalization strategy. The building is three storeys and features a typical modern mix of open plan areas for frontline and junior staff with private offices for senior managers. Executive offices, accounting and fundraising occupy the uppermost floor, with marketing, IT and most community programming occupying the second floor. The operations department is on the lower level, next to a back alley loading area, and is directly accessible from the other floors via a stairwell (See figures 5-1 and 5-2). As will be discussed in more detail in Chapters 6 and 8, the physical arrangement of each department plays a role in how identity processes unfold at Canango.



Figure 5-1. Organisation of the Canango building by floor

Over the course of my fieldwork I had regular interactions with people from four functional areas: Marketing; fundraising; operations; and, IT. I will discuss the organisation of each department; however, I will only provide a brief profile of the people who agreed to be formally interviewed during my time at Canango. I will also provide more detailed information about several of the individuals when appropriate as they make appearances in later empirical chapters.

5.2.1 Marketing

For most of the period of fieldwork, the Canango marketing department included the following roles: a Vice President of Marketing with overall executive level authority over the department; a

director of communications, who oversaw day-to-day work in the department; a project manager who organised daily workflows and prioritised projects based on strategic plans; a creative team with of a copywriter, a senior designer and a junior designer, and a copyeditor; a digital marketing function which had one coordinator position; and an events team with two managers and one junior coordinator position. Late in my fieldwork the marketing project manager left Canango for a position at another organisation and instead of hiring a direct replacement, the director of communications took over general project management and a second copywriter and third designer were hired. These changes occurred in the context of implementing a new collaboration software platform which was intended to give individual workers more day to day responsibility for project management. This change had a significant effect on the figured world of marketing at Canango and is the subject of Chapter 9. The new copywriter and designer were hired after I had already finished on site fieldwork so they were not interviewed and do not make an appearance in this thesis; however, all of the other members of the marketing team do and I will next introduce each member of the marketing team who was interviewed for, or quoted in, this thesis. Figure 5-2 illustrates the department layout and how each member of the department was positioned physically on the second floor of the Canango building.

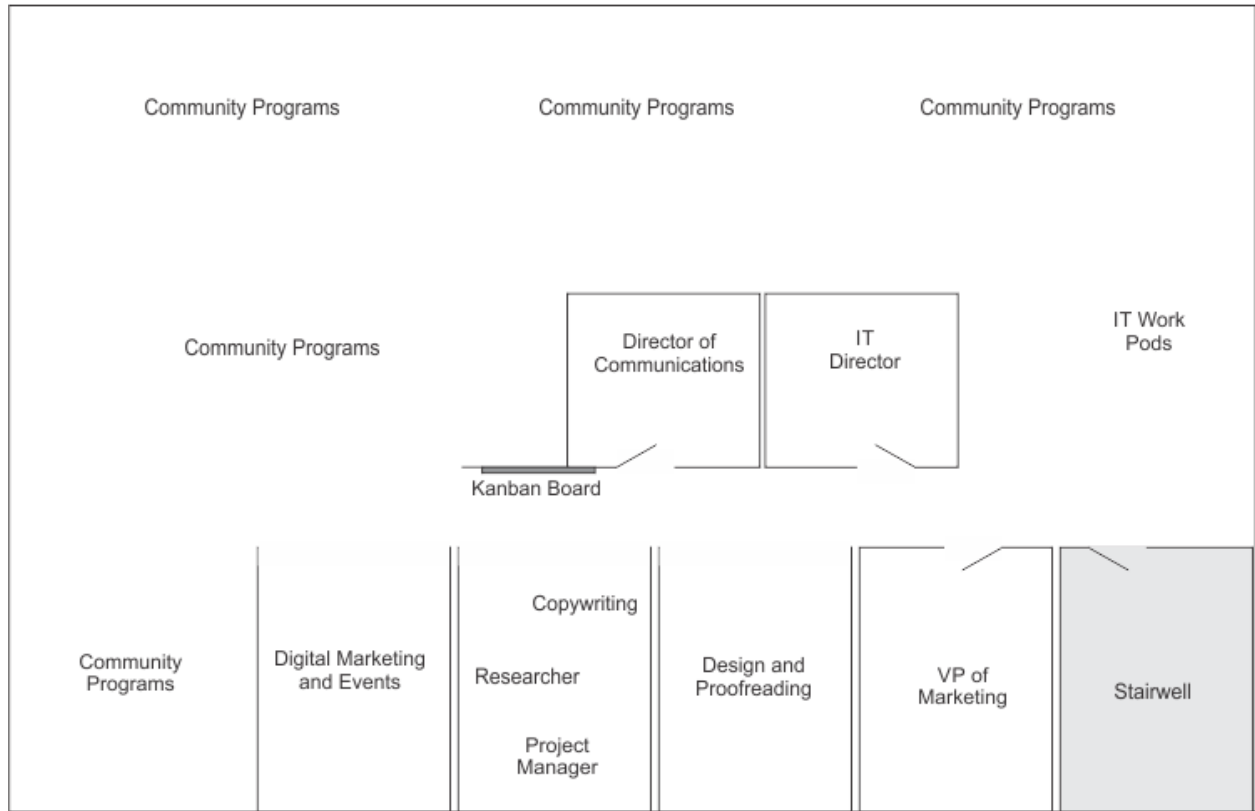


Figure 5-2. Layout of the second floor of the Canango offices

5.2.1.1 Robin, Vice President of Marketing

Robin was appointed three years ago by the new CEO of Canango to, in his words, ‘Bring our marketing up to date with current practices’. Robin’s background is in corporate marketing in the publishing and travel industries, with an emphasis on branding and digital marketing operations. This background has enabled him to introduce new processes and practices with the goal of improving productivity and accountability. Robin interfaces with other Canango executives and the board of directors to establish goals and resource activities; he also works closely with the two management level staffers in his team (the marketing project manager and the director of communications). Robin chairs weekly meetings with the events team and with the fundraising

team and he meets with creative staff when necessary, though he only rarely attends daily ‘standup’ meetings of creative staff, which are led by the marketing project manager. Robin’s office is in a corner of the second floor next door to the graphic designers and across the aisle from the office of the IT Director, with whom he meets frequently on an ad hoc basis. Mostly, however, Robin interacts with the director of communications and the marketing project manager.

5.2.1.2 Ted, Marketing Project Manager

Ted sits in the centre of the area of work pods where he can view the other members of the marketing team. He coordinates and schedules the day to day work of the creative team. Previously he was a copywriter but his early career was in IT and he showed interest in project management, proposing his current position when Robin said that he was going to find someone to help coordinate the increasing volume of projects that was moving through the department. Ted and Robin introduced new work practices based on Agile project management methods (a central theme running throughout this thesis). These changes had a major effect on the figured world of marketing work at Canango and are discussed in Chapters 6, 7, 8, and 9. Ted estimates that he spends about 70% of his time in meetings with Canango program managers and the director of communications, determining communication needs, schedules and ‘work back’ plans. Late in my period of fieldwork, Ted resigned to take a position at another organisation. Ted’s departure led to a significant change in the way work was done at Canango, which is the subject of Chapter 9.

5.2.1.3 Andrea, Director of Communications

Andrea has day to day oversight of the marketing department, giving final approval to most of the creative content that is produced. She manages social media messaging, deals with the press and works with Robin on strategic messaging. Earlier she had a coordinator role similar to Ted's current position, however she was also involved in content creation, whereas now she serves as more of a creative director. Her background is in the advertising agency business. In Chapter 9 she makes an important appearance, introducing a new collaboration software platform, Monday.com, which changed the figured world of Agile marketing at Canango in important ways. Andrea has a private office across the aisle from the work pods. She is able to see the central work pod area, where Ted, Ivy and I worked, through her office door.

5.2.1.4 Ivy, (Senior) Copywriter

During most of the period of fieldwork, as Copywriter, Ivy wrote the majority of the copy for Canango marketing communications, including speeches for the CEO and board members. Her background is in corporate communications in the Banking industry. Along with the resignation of Ted, the introduction of Monday.com, and the hiring of a second full-time copywriter, Ivy was promoted to Senior Copywriter. She also moved desks, now sitting next to the windows where Ted used to sit (however she did not take on any of Ted's former duties). As we will see, this relocation produced some interesting identity artefacts both for her as well as with program staff from other departments.

5.2.1.5 Lawrence, Senior Designer

Lawrence has many years of experience as a designer. Before working at Canango, he worked in the newspaper industry. He does both digital and print design and plays a major role in the design and production of Canango's annual report. He has seen several iterations of work organisation at Canango including the implementation and subsequent rejection of three different work collaboration platforms and is now rather ambivalent about such tools. Lawrence sits in the designer area of the work pods and has a window desk, sharing a work pod with the junior graphic designers and the copyeditor.

5.2.1.6 Shirley, Junior Designer

Shirley sits in the designer work pod area, next to the main aisle. Her background is in user interface design where she experienced Agile project management in a software development environment, a factor in her identity work at Canango as we shall see in later chapters. Shirley designs mostly for digital, including banner ads, social media posts, and e-mails, as well as for some smaller traditional media projects such as postcards, letters and so forth.

5.2.1.7 Margaret, Proofreader

Margaret is a long-time employee of Canango, starting in operations and now working as proofreader. She has a window seat in the designer work pod. All projects flow through her and she is responsible for quality control. Margaret also served as my liaison for day-to-day needs or when I had questions about various processes and who was responsible for them.

5.2.1.8 Miriam and Colleen, Events Managers

Miriam and Colleen manage the various marketing events and work closely with the creative team and the operations department. They organise the scheduling and resourcing of events, recruiting volunteers and supervising activity on site at events. They meet regularly with Robin to report and debrief on event outcomes. Miriam and Colleen each have a window desk in a work pod next to the central work pod but a high wall separates them from Ted. They do not normally participate in the daily standups and work independently except when there are marketing communications which have to be developed for a new event concept. They are very collaborative and work together as a pair on most projects, along with the Events Coordinator.

5.2.1.9 Siobhan, Events Coordinator

Siobhan works with Miriam and Colleen and assists with day to day tasks associated with rolling out events. She meets mostly with Miriam and Colleen but also attends weekly debriefing meetings with Robin. Siobhan shares a work pod with Miriam and Colleen but her desk is along the aisle, rather than along the windows.

5.2.1.10 Finn, Digital Marketing Coordinator

Finn, works on rolling out digital marketing tactics, assists with special content development such as video and photo content. He also collects analytics about web traffic and click rates and reports on results to Robin and Andrea. He mainly meets with Robin but also with Andrea and Lawrence, from time to time. Finn shares the work pod with the events team and his desk runs along the aisle, next to Siobhan's desk.

5.2.2 Operations

The operations department supervises the front desk, organises supplies and ensures that the building is provisioned and functional. Their relationship to marketing includes the printing and storage of printed promotional material for fundraising and displays for events. As such they meet with workers from many departments. I will only feature Sam, the operations manager in this section. He will make an appearance again in the empirical chapters.

5.2.2.1 Sam, Operations Manager

Sam is a printing press operator by training and has been in the trade for more than 40 years. He is proud of his craft. He was part of the marketing department at one time, but as marketing slowly became digitalized he was moved to operations, something which has clearly impacted his identity work in the organisation. Sam works in his printing and storage room on the lower level of the building next to a loading door which leads to a back alley. Sam meets with various people in the marketing department on an ad hoc basis but mostly with Lawrence, Ted, Miriam and Colleen.

5.2.3 IT Department

IT maintains and administers the computer network, deploys and updates office software, acquires and sets up hardware and customises Canango's fundraising and accounting systems as needed. The department has five people including Gordon, the IT Director.

5.2.3.1 Gordon, IT Director

Gordon supervises the IT department and coordinates with the managers of the various departments at Canango. His background is in corporate IT in the financial services sector. His office is across the aisle from Robin's office.

5.2.4 Tina, Oliver, and the Fundraising Department

The fundraising department has six people including a Vice President, Tina, with more than 25 years of experience at Canango. Tina worked her way up the ladder at Canango and has since attained a chartered fundraising professional designation which appears after her name on her office nameplate. Day to day operations are managed by Oliver who was formerly a line manager at a large retail clothing chain and this experience is reflected in the vocabulary that he uses to describe the activities in which his team engages. Words such as prospects, accounts, and offers are used frequently. Oliver and the rest of his team meet with Robin, Andrea and Ted weekly to coordinate efforts and schedule campaigns; Tina rarely attends. The meetings are held in a large meeting room with floor to ceiling windows and a long boardroom table on the third floor of Canango's building next to the fundraising department. Oliver's private office is in the centre of the floor, corresponding roughly to the position of Andrea's office on the second floor, while Tina's office is in the corner corresponding to the location of Robin's office on the second floor except her office window overlooks a busy active city street and greenspace while Robin's office window overlooks an alley and parking lot.

5.3 The figured worlds of Canango

I have already introduced Figured Worlds theory and later in Chapters 8 and 9 I will apply Van Leeuwen's (2005; 2008) social practice analysis framework to articulate the transformation of practices in the figured worlds which form part of the focus of this thesis: the *NGO helper world*; the *Agile marketing world*; and the *Monday marketing world*. In this chapter, however, I wish to briefly describe the 'flavour' of the old way of working and being in the Canango marketing department, and a figured world which is still operative to a greater or lesser extent in the various departments across the organisation as a whole: the 'NGO helper world'.

Canango, as already discussed, has a long history in Canada and has traditionally had strong grassroots involvement in governance, administration, and frontline service delivery. In speaking with long-time employees this had been the case as long as they had been there, though this had begun to change with the generational change in leadership and governance as systems become professionalised, largely as a result of demands for greater accountability and performance from funders. In any case, people with whom I spoke were, for the most part, drawn to Canango because they wanted to do good; this was also the case for senior management but what had seemed to change was more of an emphasis on performance first; that the way to best help was to be efficient and effective.

The NGO helper world in contrast was one that was highly focused on the local and doing things for individuals as immediate needs arose, whereas what seemed to be changing was more of an urgency to reach more people and deliver more programming; to, in other words, 'scale up'.

Inevitably such change will effect the sorts of work relationships one could have and work environment one could expect.

The NGO helper world was characterised by frequent meetings, shared input across job functions and a slower pace. There was essentially no hierarchy and only group, rather than individual, accountability. As Robin explains, however:

Some things out there [in the Agile work pods] are a little bit uncomfortable sometimes, but there's transitioning I see in the team, yet at the same time people may not appreciate their jobs as much as they did. Canango has doubled in size over the last dozen years and there are so many more moving pieces. The need for the work that they're doing and the services we provide at Canango is growing quickly. So we need to optimise each position.

And then I changed Andrea's position, which didn't have a lot of structure. I made sure that she met with her staff. Once a week every single member of staff gets a one on one meeting once a week for at least half an hour to see how things are going. And with the standups I don't take part. I think that would be detrimental to the overall morale. They can decide what to do day-to-day and then they do their work.

And for some people this does not fit with who they are. And I think non-profit gets that quite a bit. I think occasionally people look to non-profit because they consider it a safe haven for a little more relaxed work environment, right? More

than say like a marketing department in the for-profit sector which is very competitive. I'm used to the pressures and accountability from there. And one of the interesting comments I had was from someone who left here in an exit interview. And she was just like, look, you're not going to get these people to work like this. This is not how they go. She went to a different job at another non-profit, stayed there for a while. When she got there that manager was already doing what I was transitioning towards and she was like, it's just a new day. It's just how things are done. I never would have left if I knew what I was getting into.

Robin not only shared why he felt things used to be different but also explained one of his reasons for wanting to implement Agile methods and change the world of marketing at Canango.

One of the other things I found when I first got here was the marketing department worked for housing or young entrepreneurs whenever they wanted. We did whatever their will was. We'd put something usually half-assed together and send them on their way right? With them super happy. But they're not marketing experts. They're not communication experts. They don't know. They have a problem to solve. They've solved it with what they think is the answer. Maybe it's printing a postcard. So when I got here there was no strategy to creative at all. It's like so and so wants something and we'll build it. Right? And they didn't think about it. It was I

gotta get this done so I can get on to something else because so and so in Elder Clubs wants it. Or young entrepreneurs.

Right now they think they want a poster but they don't know anything about posters. They have opinions but they're not based on experience making good posters. So it's about trying to establish the marketing department as authorities in our work and that comes from getting everyone accountable, showing others that we know what we're doing and getting a few successes.

For Robin it was important to establish his department as the source of marketing knowhow and expertise, with control over the strategic marketing direction so that Canango can be well funded and successful in meeting its goals.

This was the motivation for wanting to switch to an Agile-style work system, a process which is still incomplete, and which defines the 'indeterminate situation' (Dewey, 1938) at the heart of marketer identity work at Canango.

5.3.1 Implications for Research at Canango

This chapter began by laying out the importance of context to interpretive research. I followed by providing details about the research setting and the people who populate and construct it. Just as understanding context is important for explaining situated meaning from the point of view of the research participants, so is it important to consider when carrying out the fieldwork itself. In my

case I made it a point to attend a number of regularly scheduled meetings, namely daily standups with the creative staff, which were led by Ted; weekly meetings between the managers of the marketing team and the fundraising department; and weekly meetings between Robin and the members of the events team, Miriam, Colleen, and Siobhan. Because of the importance of Ted to the organisation of work at Canango and his efforts to establish a new figured world of Agile marketing (more later), I positioned myself close to his work area so I had a sense of the continuous flow of communication and action through the creative services team. My vantage point also gave me a view of Andrea's office and I could see over the low wall to the design team. Although a higher wall blocked my view of the events team and Finn's desk, I could easily hear their conversations which would sometimes lead me to get up and walk over and ask *ad hoc* questions of the events team or Finn, as warranted or appropriate. I would also make a point of going to visit Sam in the printing room several times a week and this would take me past Robin's office and I would drop in and see what was on his mind as the weeks went by. As the above passage suggests, spatiality plays a role in my study. For example, the relative proximity to windows served as a marker of rank within the organisation, not only in the marketing department (for example Lawrence and Miriam have window seats while Siobhan and Shirley sit next to the aisle) but also between departments (Fundraising is on the third floor with the CEO while Marketing is on the second floor and Sam is on the lowest level and Tina has a window seat with a desirable view while Robin's window overlooks an alley and parking lot). Later, with the introduction of a new group collaboration program and the temporary shift to remote working, some of these physical hierarchies were disrupted. I will not detail other observations about spatiality here, reserving them for the empirical chapters; however, it is important to

mention that in my fieldwork material aspects of the interactions among Canango staff were considered as much as language and activities.

5.4 Summary

In this chapter I discussed the rationale for my case site selection based on the findings of my pilot study, leading to the selection of Canango, a large NGO undergoing digital transformation of marketing practice for my fieldwork. I then detailed the history and characteristics of Canango, outlining the physical layout of the various departments. Following an overview of the site, I introduced the people with whom I interacted on a frequent basis during my fieldwork and provided a brief description of their roles, internal networks, and workspace locations in the building. The implications of these factors for my research were then discussed, foreshadowing that in addition to discourse and activities, this study also considers the material characteristics of my case site, building a holistic view of Canango. I next take this ‘eyes wide open’ approach into Chapter 6, with a look at the sorts of identities under construction in the Canango marketing department and what kinds of activities and outcomes these identities make possible.

Chapter 6. A Multiplicity of Marketers

As stated earlier, the view of identity I adopt in this thesis is the social practice theory of identity known as Figured Worlds conceived by Holland et al. (1998). Identity is not seen as something that one has so much as something that one does or practices within imaginary social understandings defined by practices and various mediating artefacts. Even when considering the various ways one may classify identities, such as ‘socially available identities’ (Watson, 2008), as is done in this chapter, they are still ultimately appropriated, enacted, resisted, or rejected in some way. Identity is negotiated (Ellis and Ybema, 2010). That is the subject of this chapter; in it, I ask what sort of marketer identities are in play at Canango, how do they originate, how are they made real (Cooren, 2020) and what sorts of actions do they afford or constrain?

6.1 Figured Worlds: Identities in Practice

By way of review, Holland et al., (1998) define figured worlds as ‘socially and culturally constructed realm[s] of interpretation in which particular characters and actors are recognized, significance is assigned to certain acts, and particular outcomes are valued over others’ (p. 52). In other words, figured worlds are spaces in which people build a sense of who they are, and where they are positioned, in relation to culturally agreed frames of reference through the activities they undertake; activities which give an embodied sense of what it means to be a certain kind of person (Holland et al., 1998). They are the sociocultural spaces in which one learns the rules of what is considered normal when being a certain kind of person (Gee, 2014b). Of course nobody lives in just one world. The various figured worlds in which we reside

intersect and these intersections contribute to the dynamic nature of identity work and to some extent afford or constrain who it is we can be and what we can accomplish in our lives (Gee, 2014a; Holland et al., 1998). The effects of these intersections are further amplified in environments undergoing transformation, such as Canango, where the digitalization of marketing work has led to several important changes in how work is organised and performed. Along with this transformation has come the introduction of new underlying assumptions about how marketing at Canango works, and, with them, a shift in who it is possible to be when embracing the new world which management would like to see prevail in the marketing department.

I will next briefly review the specific methods I used for this chapter. Then I will present my empirical material, embedding my analysis within the main narrative. I then offer my interim conclusions about marketer identity work at Canango, discussing the implications of my interpretations for the rest of this thesis.

6.3 Chapter methods

Drawing on Vygotsky, Bakhtin, and Bourdieu, Holland et al. (1998) see identities as co-developing in practice as people take up or are assigned positions within ‘spaces of authoring’ established through sociohistorical constructions over time. People author their identities using the resources and artefacts already put in place by those who came before, whether vocabularies, routines, objects, ideas, or Discourses as well as new ones arising situationally as people improvise selves as needed. I thus gathered and co-constructed empirical material with the marketers at Canango in various ways in order to understand what had come before as well as what was being constructed in the present. These ways included participant observation, sitting

and working in the work pods of the marketing department, talking and engaging with the marketers on coffee breaks and at lunch, making notes and conducting ad hoc interviews as opportunities presented themselves. I also performed semi-structured interviews with each member of the marketing team, as well as Sam the operations manager, Gordon the IT director, and Oliver, the director of fundraising. These meetings were recorded with consent, except for several interviews early in my fieldwork where individuals preferred that I not record. In those cases detailed notes were taken during the interviews and carefully reviewed shortly afterward to fill in details as much as possible. When permitted I attended both intra- as well as inter-departmental meetings, such as ‘daily standups’ (of which more later) weekly meetings of the events team, and weekly meetings between the senior managers of the marketing and fundraising departments.

As I worked among the people at Canango, I produced copious field notes in which I captured my thoughts about salient utterances and activities. I also made sketches tracing movements and took photos where appropriate and when given consent by the participants (See Appendix 2). These activities occurred during approximately 200 hours of fieldwork over roughly six months. I later conducted follow-up telephone interviews and conducted a multimodal analysis of a new group collaboration software platform that was adopted by the marketing team (See Chapter 9).

I then re-engaged with the empirical material while writing this chapter, producing identity classifications based first on higher level descriptive codes (Miles et al., 2020) divided into interpretive ‘parent codes’ (Saldaña, 2013) then further subdivided into interpretive ‘child codes’ (Saldaña, 2013) in order to attend to localised identity work. The interpretive child codes then

guided analysis of activity captured in my field notes to identify the sorts of affordances and constraints emerging from each of the identity types developed in higher levels of analysis. Watson (2009) calls this simultaneous analysis of empirical material and writing ‘working in an ethnographically oriented manner’ (p. 259) and argues that it is well suited to explain *how* things work as opposed to *why* things happen, as is common with positivistic research based on the operationalisation of variables and the use of inferential statistics.

6.4 A new world is introduced to Canango

6.4.1 Agile marketing

One of the first things I noticed when I began my fieldwork in the Canango marketing department was a Kanban board (See Exhibit 8-1). Kanban boards are project management tools which display columns of work tasks to be done, people to do the work, and completed tasks. Under each heading are ‘tickets’, in this case paper sticky notes, on which tasks are written by the project manager. Individuals select a sticky note of their choice and place it under their name heading to indicate to everyone that they are working on the task. As one completes a task, the sticky note is moved over to the ‘done’ column and a new task is selected. Kanban boards are a classic example of an artefact which defines a particular style of Agile project management developed at Toyota in the 1940s for manufacturing (Ewel, 2021) which has spread into marketing practice where it underpins an approach called *Agile marketing* (Brinker, 2016; Edelman et al., 2016; Smart, 2016). Agile marketing has its antecedents in the Agile software development movement which traces its history to a seminal meeting of influential Silicon Valley software developers in 2001 (Smart, 2016). The gathering produced a document called,

‘Agile Manifesto for Software Development’ (Beck et al. 2001) which was a call to arms against what were considered to be key flaws in the dominant software development methodology of the time. Commonly known as ‘waterfall’, the traditional method relied on detailed specifications, rigid structures, and top-down management control; properties which were felt to lead to poor project outcomes (Sommer, 2019). Agile was not intended to be a methodology, rather it was meant to define a philosophy that would inform a flexible, open, approach to project work based on a core set of values, namely: “Individuals and interactions over processes and tools; Working software over comprehensive documentation; Customer collaboration over contract negotiation; and, Responding to change over following a plan” (Beck et al, 2001: NP). These values are further elaborated in a list of twelve principles (listed in Appendix 1), such as, “The most efficient and effective method of conveying information within a development team is face-to-face conversation” (Agile Alliance, 2022: NP).

As mentioned, the above approach has since been adapted to other domains, including marketing and various professional bodies such as *The Agile Alliance* (agilealliance.org), the *Agile Business Consortium* (agilebusiness.org), the *Agile Consortium* (agileconsortium.nl), the *Agile Marcom Consortium* (agilemarcom.nl) and certification standards such as the ‘Disciplined Agile (DA) 2.0 process decision framework’ (Agile Alliance, 2022; NP) have been established as part of what has arguably become an Agile ‘industry’. Kartajaya et al., (2021) define Agile marketing simply as, ‘the use of decentralized, cross-functional teams to conceptualize, design, develop, and validate products and marketing campaigns rapidly’ (Ch 1.); however, in practice it may be more formal than such a definition suggests. Although the specific details of Agile marketing

implementations naturally vary from site to site, a number of common characteristics generally stand out.

Agile marketing teams usually have a mix of creative and technical people including a project manager, sometimes called a scrum master, depending on whether the organisation utilises the 'scrum' framework, described below (Edelman et al, 2016). The project manager will function as a liaison between the so-called project owners (the person or people in the organisation for whom the work is usually being done and who has final say over the work) and the creative and technical workers. Teams will tend to work in close proximity to each other and work will be distributed by the scrum master; however, teams will usually have the authority to organise their work structure to a large extent (Brinker, 2016). Work may also be organised according to principles of 'Kanban', including the deployment of a 'kanban board', described at the beginning of this section, which will be placed in an area visible to all team members. Agile marketing teams normally sit in shared work areas, often called 'Agile work pods', the purpose of which is to facilitate quick verbal communication about issues as they arise (Brinker, 2016).

Scrum is the most popular form of Agile used in software development and many organisations that adopt Agile frameworks for marketing use it as well (Smart, 2016). Although its specific implementation will vary from site to site, it is a structured approach. A typical workflow may proceed, as follows:

Work begins with meetings between the project owner and project manager to determine the scope of the work. Next a team 'kick-off' meeting brings the agile team together to organise

work into short phases with a specific deliverable to be realised over a set period of time, a process known as a ‘sprint’. Specific tests and actions are agreed, such as the effect of changing the headline on a website landing page, which is measured in preparation for iteration and optimization (Edelman et al, 2016: NP). Each day, team members gather in a ‘daily stand-up’, a short meeting to report on their status, discuss roadblocks and state what they plan to do next. This daily practice is where team members effectively make promises to each other, serving as a powerful mechanism for producing accountability (Edelman et al, 2016: NP). The project manager may make adjustments to work assignments and project statuses, depending on what is shared at the standup, with work reprioritized if necessary, with lower priority actions going into a backlog. Hypotheses are generated about specific actions (E.g. “Changing a headline on a website from the colour green to red is associated with an increase in the number of clicks on a link.”). As test results come in, marketing tactics are iterated (Edelman et al., 2016).

The above sequence is idealised, of course. Champions of Agile marketing argue that the approach generates improved marketing performance (Brinker, 2016; Edelman et al, 2016; Smart, 2016). It is likely, however, that Agile marketing implementations suffer from many of the same problems that arise in the software development domain, such as confusion and interpersonal tension due to a lack of understanding of Agile principles (Hekkala, et al, 2017), the potential for functional elitism and rivalry between people working on Agile teams versus those working in traditional ways (Nerur et al, 2005), distracting work environments and a lack of privacy (Cho, 2008), the potential for intra-organisational dependencies to disrupt team decision making (Moe et al, 2012; Stray et al, 2018) and many others beyond the scope of this chapter.

Regardless of the perceived advantages and disadvantages of marketing agility and Agile marketing, these constructs remain just that; social constructs derived through processes of negotiation and interaction between multiple parties across the organisation. Ultimately Agile marketing is a figured world made by people as they carry out their day-to-day work using various Agile artefacts and engaging in various activities; and as we know, activities are deeply intertwined with identity construction (Simpson, 2009; Watson, 2009; Ybema et al, 2009).

Of course, underpinning Agile project management is the very idea of agility and the understanding that it is a desirable quality of people and organisations in the first place. Agility, from a management perspective, is generally understood as: ‘The ability to change rapidly in response to customer needs and market forces’ (Anon, 2022). More specifically, marketing agility has been defined as “a firm’s ability to proactively anticipate and sense marketing opportunities, and to respond quickly and flexibly to these opportunities to better satisfy customer needs” (Zhou et al, 2018: 3). Kalaiganam et al. (2020) define marketing agility (note, as distinct from ‘Agile marketing’ as described above) as: ‘The extent to which an entity rapidly iterates between making sense of the market and executing marketing decisions to adapt to the market’ (p. 2) This definition is process oriented and grounds marketing agility in an ethos of ‘sensemaking’, iteration, speed, and marketing decisions. At the same time, however, it evidences the thoroughly social nature of Agile frameworks and any sort of ‘Agile’ identity which may be constructed and expressed within them.

6.4.2 Canango goes Agile

Canango's marketing team has doubled in size in the last 10 years, a development which has led to significant changes in how projects are planned and managed, with an increasingly formal business-like approach to management having become normalised. In the last two years several marketing team members have left as a result of these changes, while new staff with specialist skills have been added in their place, including Robin, tasked with, in his words, "Getting us up to speed with current marketing practices". These practices include the introduction of specific tools such as a 'daily standup' (a short meeting where workers report work progress to the whole group), the use of a Kanban board, and the central role played by a marketing project manager (similar to a 'scrum master' in Agile). The team has also experimented with various team management software applications such as *Basecamp*, *Freedcamp*, and most recently *Monday.com* which are closely aligned with these methodologies.

Such changes were thus anticipated to mediate the ways in which the agile self is produced and sustained at Canango given the role of activity and practice in identity construction (Holland et al., 1998; Lorino, 2018; Simpson, 2009). For example, as mentioned in Chapter 4, role transitions have long been understood to trigger identity work (Ibarra, 1999); however, in this case we have an example of a department undergoing fundamental change to the way it organises and prioritises work, leading less to role change than deep shifts in the underlying values informing the work. I thus noted that identity work in the Canango marketing department appeared to be identifiable along five second order 'parent themes': *Managerially Supplied Identities*; *Emergent Identities*; *Technologically afforded identities*; *Socially afforded identities*; and *Performed identities*. I will also discuss the relevance of location artefacts as mediating

identity construction at Canango, including how they, along with other physical artefacts and habits may be theorised into a sixth category, *Captured Identities*. Each of these classes of identity helped me to attend to further interpretive ‘child codes’ (Soldana, 2013) representing various personas (Watson, 2008) which, as we shall see, enable or inhibit certain types of action based on the underlying assumptions within the worlds by which they are defined. Moreover, these localised personas may be often effectively tied to other ‘exogenous’ figured worlds which intersect with the main figured world in play in a given workplace. I will now look at each of these identities, along with examples of what they make it possible to do in the new figured world of Agile marketing at Canango (See also table 6-1 at the end of this chapter for an overview).

6.4.3 Managerially Supplied Identities

I define Supplied identities as socially available identities originating in discourses which index one’s location within a figured world and which are introduced and regulated by people with greater power over those with lower power in the organisation. Two supplied identities were observed at Canango: 1. ‘Agile Experts’ -- *We’re agile because we know what to do* and 2. ‘Agile organisers’ - *We’re agile because we’re systematic and organised*.

6.4.3.1 Agile Experts

Earlier we quoted Robin as having been brought in to bring the marketing team up to date on the latest methods; moreover, he is working to instil agility in the team. One of the ways he hopes to

do so is to get marketers to embrace specialised expert identities as a way to improve performance, speed up decision making and shorten response times. As Robin stated:

“I went through and defined jobs. I made people responsible for tasks within those jobs. I put someone in charge of QA. I worked on a workflow process that every piece has to go through for QA [...] to make sure there were no more errors. Then I worked on, like trying to optimise, which is a bad word. Just a way of saying I tried to streamline how much work each person had to do, because they were all participating in every project in different ways. Like the designers were having input on copy, and all of that. Everything was taking forever. So it’s just saying copywriters are responsible for copy, designers are responsible for designing. You guys don’t need to have a meeting as a group to decide if the design is okay. The designer knows if it’s okay or not...”

The goal for this supplied identity is to position the department within the organisation as experts in what they do as illustrated in this excerpt from my fieldnotes.

The meeting between the marketing and fundraising teams is going in circles as they discuss the name of an event. They can’t agree on the name originally developed by Ivy (the senior copywriter). Oliver (the director of fundraising) says “Haha talk about making decisions by committee.” Robin responds in a slightly exasperated tone. “We have experts, let’s use Ivy’s idea. That would be the opposite of making decisions by committee.” Ted adds, “Yes, let’s not overthink it, we won’t come up with something better and the clock is ticking”.

Here we see the provision of the identity of Agile Expert as Robin reinforces the use of his team's expertise in order to get things done by positioning it in a cross-functional meeting with both fundraising managers and his marketing team present. Ted reinforces the identity by immediately jumping in to agree with Robin and move the meeting along. One might see this as a form of identity regulation through the attempt to instrumentalise a "socially available identity" (Watson 2008: 128), in this case the "marketing communications expert", as a socially available personal identity upon which marketers may otherwise draw independently.

6.4.3.2 Agile organisers

Another supplied identity is that of the systematic organised Agile marketer, or what I label 'Agile organisers'. This identity is evidenced by incidents such as the following ad hoc meeting recorded in my field notes:

Orlando from the young entrepreneur program has just left the design team after asking for yet another revision of what should have been a simple recruitment poster. Robin comes out of his office and quickly walks up to Andrea, Ted, Lawrence, and Ivy who are discussing the requested revision and says, "We're not their agency. How much would we charge them for this? We're organised! Now they need to get organised upstairs and figure out what they want to do."

Here Robin reinforces the identity of the agile marketer who is able to get lots of work done for others because they are organised and systematic. Crucially he does so by othering the internal client; both by referencing their lack of organisation compared to the marketing team and by positioning multiple revision requests as inconsiderate of the team's valuable time. Moreover,

Robin's use of the word "upstairs" to refer to the young entrepreneurs program, rather than by the program's name, separates the teams spatially. Interestingly, he waits until the young entrepreneur program worker has left, having overheard the conversation from his office, intervening after hearing the creative team members begin to discuss how to execute the requested revisions. Whether Robin waited until the young entrepreneur worker left to emerge from his office in order to avoid direct conflict or to avoid weakening the position of his marketing team in front of a member of a different department, or for some other reason is unknown. Regardless, the onus is now on his creative team to go back to the young entrepreneurs program and put limits on what it can request, this leads to performance on the part of the marketers which reinforces the Agile organiser identity.

Similarly the same issue came up later that day in an events team meeting:

Robin: That poster was 75-percent done and young entrepreneurs wanted to change it again.

Miriam: They don't respect our deadlines. It's creating significant tension. We're a volunteer-led organisation and we're short on volunteers.

Robin: Having volunteers decide on Creative details like they want, is simply not efficient. My feeling is our team could really streamline the processes, guest experience programming, and sponsorship if we took back the layout and logistics of the Convention Hall in addition to the poster design. I already consider creative to be logistics. Since its assets that move around and have to be somewhere at a certain time.

Colleen: Well our staff is very lean, but we can't make decisions. If we communicate with the decision makers that we are working on these events on the side of our desks, maybe we can get resources and the ability to make some decisions about their event. But they want to do it all.

Robin: We are the ones taking the risk with our time yet they need us to bail them out. They have no idea how to structure event promos. The way you do it is to work hard for a week after the event announcement, then it's silent. Then you pour your whole budget into the last three weeks. That's the way you organise an event promotion. They're burning everybody out and we're going to have to save their bacon again.

Ultimately, this supplied identity affords Robin the ability to rally his team, reinforce the Agile organiser and Agile expert identities, and focus on their goals, rather than allow themselves to be distracted by disorganised colleagues from other departments.

6.4.4 Performed identities

6.4.4.1 The empathetic manager

The theme of performance was prevalent in Robin's department, not only in terms of productivity but also in the dramaturgical sense (Goffman, 1959) and carried over into a second class of identities which I label performed identities. Similar to the idea of personas which I

borrow from Watson who defines them as: “[t]he various public and private selves which an individual presents to others in the various circles in which they mix” (2020, Ch. 17, Fig. 17.1). For example the following vignette drawn from my field notes illustrates the ‘empathetic manager’ identity, part of the larger figured world of ‘servant leadership’ (Greenleaf, 1991), performed by Robin in an events team meeting:

At the beginning of the events team meeting, Miriam, Colleen and Siobhan are expressing their frustration over the lack of volunteer participation by the IT department, along with what they perceive to be a general lack of respect or appreciation for how much time the events team puts into both external and internal events. All the while Robin is exhibiting signals that he’s listening...lots of “M-hmm...yeah...yeah...that’s frustrating”, “What are your most pressing concerns right now?”.... His tone of voice is gentle, he adopts a half-smile and tilts his head slightly to the side while listening and occasionally winces in solidarity. Eventually Miriam looks at Robin and sighs loudly, flopping her head down toward her chest. Everyone laughs and the group moves on to the next agenda item still chuckling and sitting up and directing their focus on plans for a suburban breakfast event that will need volunteer support.

In this case Robin performs certain actions to go along with complementary utterances to fashion the empathic manager identity. Checking in, nodding, and wincing in solidarity, agreeing that the IT department is shirking all help to construct a persona that builds trust and social capital, keeping the events team onside, leading to Miriam resigning herself to, and dramatising, the events team’s status as long-suffering marketers (see below), with the team bonding, regrouping and shifting focus to their agenda items.

6.4.5 Emergent Identities

A second class of identities observed in the Canango marketing department are what I label *emergent identities*. I define these identities as those which arise organically through the interaction of individuals as they negotiate their position within a figured world and draw upon cultural tools and improvised discursive resources as mediators for action available to them in specific contexts.

6.4.5.1 The long-suffering marketer

We just saw Miriam and her colleagues on the events team interacting with Robin as he performed the empathetic manager. Robin, in turn, was responding to what I have labelled the ‘long-suffering marketer’ identity, exemplified in the following vignette:

Miriam: IT never seems to do anything. Why is it that IT never seems to do anything?

Why is it that we have to deal with the compensatory days? Everyone has to put in a certain number of volunteer hours at events.

Colleen: Our team of three can't do everything.

Siobhan: Other people feel exempt or think they're more important!

In this case the long-suffering marketer identity, which also clearly has an element of performance, Generates sympathy from Robin, while simultaneously helping the events team bond with each other in the face of another department challenging organisational commitment to the cause. It also emerges from certain assumptions about how things are supposed to work at Canango according to the events team's understanding, namely that everyone is to share in the

volunteer work. Everyone is equal but some people do not seem to agree. This mismatch serves as a resource that the events team uses as they construct the long-suffering marketer identity.

The long-suffering marketer identity may also be used in other ways, however. Shirley has her own experience of having to suffer through the behaviours of people from other departments:

Researcher: So what do you think of Agile Project Management and the notion of being agile?

Shirley: I feel like, it's kind of like a square peg in a round hole here like it doesn't quite work I think as Agile is intended to work. It would be nice if our internal clients knew our process. If it goes to another department it doesn't really work you can only work when everyone understands the processes.

Researcher: Yeah, I've heard the expression Agile doesn't play nicely with others.

Shirley: I think people are used to just like, I'll just go down there and say, can you make me this thing? They don't realise that, we have a list of things that are prioritized and like this thing you need three months from now it's not a priority. I have so many things coming at me I just keep track of things on paper otherwise it's just like go, go away!

Whereas the long-suffering marketer identity afforded the events team the ability to bond with each other and gain sympathy from Robin, in Shirley's case it helps her cope and build a sense of

agency to ‘just get the job done’ in a sort of heroic manner, improvising and resorting to paper lists instead of the authorised Freedcamp software. (We shall return to this same example in a vignette later, in Chapter 8 as illustrative of the enactment of a different identity category).

6.4.5.2 The Back-Door Rebel

Interestingly, Shirley’s frustration with a lack of understanding of how Agile ‘is supposed to work’ among colleagues from other departments is indirectly negatively reciprocated. Other departments have noticed the changes in the marketing department but have taken a different approach to getting their projects done; namely, by working around the rules and adopting what I have called a Backdoor Rebel identity. This identity is seen most clearly in a story shared by ‘Sam’, the Operations Manager, who as the reader will call was formerly part of the marketing department, but now after 40 years at Canango works in the print shop and supply rooms on the lower level of the building.

“I started out in the marketing department, but somebody decided well let’s make Sam operations. I’m the guy that does everything and anything for anybody . . . [for] all the different departments. Now they’re supposed to go through marketing and then it gets to me, but I just had one this week from the housing program. Sam, we need 200 of these. So instead of going through marketing, like you’re supposed to, they just give me the pdf and I’ll open her up, set up my computer, send it to the copier bing bang done. They had it in less than half an hour, right? But if that went through the marketing department, they say no, we need to do these, these, and these first, but she brought it to me when the marketing department was on their lunch

break. So, I just take over and do whatever I gotta do. If you need it I supply it. I try not to make people wait. Everybody's job is important."

Here Sam highlights that if you really want to get things done you may have to break the rules and come downstairs when the marketing department is away, and he will take care of things for you. When the new formal processes get in the way Sam will rescue you with common sense and experience and "bing bang" you'll get what you need because everyone's job is important (presumably not just who the marketing department upstairs thinks is important). Changes in technology and the formalisation of processes in a growing organisation have led Sam to construct an identity for himself as someone who trusts experience over new processes that set out 'the way Agile is supposed to work'.

6.4.6 Technologically afforded identity

6.4.6.1 The software warrior

Shirley's enactment of the long-suffering marketer identity is also linked to another class of identities that I define as 'technologically afforded identities'. These are identities which arise out of the effects of, and therefore interactions with, various affordances and constraints of technology and the ways in which they figure worlds. An example would be the characteristic and very loud sound of the typical Harley Davidson motorcycle, due to the design characteristics of the engine. This sound is part of the identity of Harley riders and signals membership in a community of motorcycle enthusiasts of a certain kind. It is also an example of a technologically afforded identity based on affordances, or qualities that enable agency. In the case of Canango

the most prominent technologically afforded identity, which I label the ‘software warrior’, was actually defined by technological constraints as much as affordances. Ivy, illustrates:

I've been very vocal to Ted and Andrea, and Robin about it [...] the problem with Freedcamp is, it doesn't understand like in a day, you know, things come up [...] So all of a sudden [...] there's the Young Entrepreneurs Camp. It seems like it's a long way away because it's October 31. But, you know, like, for instance, I was given the task...Freedcamp told me... that, "oh, you have time this week. so I want two sets of speaking notes then." And also for Sunday breakfast in November, everything was given an October 11 deadline. And so it's like, well, that's not going to work because, you know, it's a question of my story. So, I don't mind writing a story at home. You know, this, you know, the pod environment is very distracting. It's fun...yeah it's nice to talk to everybody...but sometimes it's hard to focus. Even with headphones on, you know?

In this vignette the constraints which characterise the software, and which Ivy anthropomorphised (e.g. ‘Freedcamp told me’) and the noisy work pod environment (low walls offer no sound dampening) hamper Ivy’s ability to live out the agile organiser identity, or to simply feel competent and productive; however, at the same time, these problems offer a reason for her to take work home against the desires of Robin in order to obtain quiet focus and do the best job that she can on the story because of her commitment to Canango, its clients, and the idea of getting the story right.

Shirley, too, evidences the software warrior identity:

“I triage everything myself in a paper list because I hate Freedcamp ... I think it’s OK for Ted but it’s not great for me because the deadlines don’t move [in Freedcamp] ... So you’ll just have a list of 20 things that say they’re like 300 days overdue so it’s just constantly yelling at you that you suck at prioritising anything”.

Here again we see the anthropomorphization of technology (e.g. ‘it’s just constantly yelling at you’) as Shirley expresses her frustration at being able to do her job effectively and appropriate the agile organiser and agile expert identities supplied by Robin. Shirley then improvises the use of a paper list, which affords her the ability to filter out information that she finds distracting, countering the feelings of inadequacy engendered by the use of the Freedcamp software and Ted’s processes.

In Chapter 8 we will see how practices such as list making relate to the idea of resemiotization (Iedema, 2001; 2003); but for now I emphasise that what may seem like the mundane use of the familiar to-do list is, in Shirley’s case, specific response to a problem related to technological artefacts supplied by technologies used by Shirley and the rest of the marketing creative team. In this particular case, the *Freedcamp* software is flawed and forces constraints upon the marketers because of feature limitations and the continuous barrage of irrelevant e-mails about projects that are complete but still appear as unfinished in the software. In her own way, Shirley is resisting the software (and in effect Ben’s authority) by deliberately limiting her ability to interact with the software and other people thanks to the affordances and constraints inherent in a paper list (e.g. it is private, it does not respond, it offers the ability to clearly frame work of interest to Shirley and cannot be added to by others).

I will discuss the mediational aspects of Shirley's lists in more detail in Chapter 8. Next, however, I will proceed to another class of identity observed at Canango, the socially afforded identity.

6.4.7 Socially afforded identities

We have just seen several examples of identities which draw upon technological artefacts in their construction. Since technology is constructed through social processes, it is therefore unsurprising that I also observed examples of what I have labelled 'socially afforded identity'. I define such identities as those which already exist 'out there' in the social world, rooted in historically produced Discourses and are available effectively 'ready made' for appropriation by people as identities that they live or as cultural tools which serve as the mediational means to achieve certain goals (see Chapter 7). Watson (2008) calls such identities 'Social-identities' (p. 127), but I prefer to call them socially afforded identities to avoid confusion with social identity theory (Tajfel and Turner, 1979; 1986) and to emphasise the affordances offered by such identities and how people use them.

6.4.7.1 The Quirky Creative

One of the clearest examples of a socially afforded identity within Canango's marketing department and indeed creative services departments more generally, is that of the 'quirky creative', typified by a desk full of props and unusual collections of objects everywhere, whether to inspire or to advertise their creativity to others (Johnson, 2015). This is also the case with Ted

who, although he is now in a technical managerial role, was originally a member of the creative team, as well as with Andrea as shown in this excerpt from my field notes:

Most of the creatives on the marketing team display the usual trappings of marketers in roles such as copywriters, designers and creative directors. Their offices and work pods are decorated with colourful art objects, collections of various pop-culture figurines, and ironic odds and ends. Ted, for example, has an old typewriter, vintage movie posters and a hot sauce collection on his side shelf. Meanwhile an entire wall of Andrea's office is covered in brightly coloured abstract art and clearly visible from the aisle outside her office, while her front wall, which is not visible from outside her office, and which she looks at while working, has no art on it.

Other people have decorated their work pods with symbols linked to the struggle for social justice. Ivy, the writer, for example has several small signs containing famous quotes from speeches by noted social justice leaders such as Martin Luther King. Such displays are common throughout the Canango offices and serve to motivate and inspire as well as signal alignment with and commitment to larger organisational goals. However, as suggested by social semiotic theory, people choose semiotic resources for a reason (Jewitt, et al., 2016). The fact that some people choose to decorate their work pods with Martin Luther King quotes and others choose hot sauce collections does not happen by accident.

6.4.7.2 The Culturally Sensitive Marketer

The use of such artefacts also serves to continually remind members of their mission. This time we turn to a meeting of Andrea and the events team as they plan a community luncheon. Questions arise about the possible location and its possible symbolic value:

The Events Team and Andrea are meeting about an upcoming fundraising banquet.

There is Indigenous wall art in the meeting room; however no meeting attendees are indigenous. They are discussing the optics of having the event at one site, versus another.

Colleen: I don't think we should have the banquet at Longhouse (A meeting hall at an Indigenous community services organisation) because it highlights the disparity with people who walk in off the street and drink coffee out of Styrofoam cups, so let's have it at the Civic Hall instead.

Andrea: Yeah, and we need to remember to include an elder to bring greetings but someone who is part of the program in some way. We can't just "rent" an elder and put them in front of an audience or it will be phoney.

In the above excerpt, Colleen and Andrea exhibit cultural sensitivity toward a core constituency served by Canango. Although Andrea and the members of the events team are not indigenous, many program staff are and the organisation has links to several Indigenous organisations. At various times, events have been held at Canango which have included traditional Indigenous ceremonies performed by elders. Workers at Canango are thus socialised to be culturally sensitive, not only to indigenous constituencies but people from other racialized or economically and socially marginalised groups. In speaking with members of the marketing team, such

awareness was already expected in previous work settings or life activities. In fact, it is hard to imagine someone being hired by Canango who did not evidence a social and cultural sensitivity to Canango's constituencies in the first place.

Socially afforded identities, then, are not constructed solely from inside the organisation but from outside, 'brought along' (Jones, 2016, Ch. 6) and enacted through the use of available artefacts from within (e.g. Indigenous art and ceremonies) and without (e.g. choosing the appropriate venue, hiring an elder who is already part of the program). Jones notes:

'For identities to be "brought along" into interaction requires two things: that there is an inventory of "technologized" identities (or, as Wortham [2003: 193] calls them, "metadiscourses of identity") available to social actors, and second, that there exists some means by which to signal or "invoke" them. These identities and "means of identification" together constitute what Gee (2012, 2014) refers to as "identity kits"' (2016, Ch. 6).

According to Gee (2014a, Ch. 4) it is through the deployment of such identity kits that one shows to others what sort of person they are in any given setting and how one is able to have multiple identities depending on the situation. This way of understanding identities meshes well with Figured Worlds and so it will reappear in later chapters.

This concludes my description of the most often observed identity types among the marketers at Canango. So far, however, I have only grazed over the surface of some of the ways individual identities come about or are made available. In the next section I will discuss several other, what

might be considered, material artefacts that were important to how identity work was accomplished at Canango. These include the use, or mediational role, of location artefacts, followed by the ways in which identities are ‘captured’ materially for appropriation or deployment by others in the future.

6.4.8 Location artefacts: situational identity glue

Throughout my time in the Canango offices, I observed cultural artefacts relating to location which mediate meaning and figure the world of Agile marketing. We have already seen Robin’s use of the term ‘upstairs’ as a noun to other the young entrepreneurs program; as well as the way in which the location of the operations department on the lower level of the building mediated the construction of Sam’s backdoor rebel identity as he related the way he cooperated with the housing department to get around the Agile marketing system of triage and work out of sight downstairs while the marketing department was on their lunch break. One more location artefact has to do with rank and whether one has a private office, a window seat or an aisle seat, with status moving upward from aisle seat to window seat to a private office and finally to a private office with a window. The most junior staff staff such as Shirley, Finn, and Siobhan had aisle seats in the work pods while more senior staff, including Ted, Lawrence, Margaret, Miriam and Colleen all had window seats, providing better light and a view outside. Later in the fieldwork, Ted left Canango and Ivy was promoted, moving to Ted’s former desk at the window while a new junior writer joined the team (after my onsite fieldwork had ended) and took over Ivy’s old aisle seat. Interestingly this move initially led to confusion as program staff made assumptions about Ivy’s job, as Ivy notes:

So it's kind of funny though too because after I moved where Ted was sitting I guess a lot of other people in the building, they didn't quite know you know what my role was so they just seemed to think I was the new Ted where I was getting these emails saying oh hi, do you know when is this is going to be printed so I'd say well you know I didn't actually work on that. I wasn't involved so I handed it over to Andrea but you could ask her and you know, getting these emails back saying oh well we just sort of thought with your new project manager role and I was like no!

Researcher: So with you sitting where Ted used to sit suddenly people who casually walked by may have assumed you had taken over Ted's job.

Ivy: Absolutely that happens all the time it was almost like a joke, and just having the word manager in there but you know it's never said project manager, I mean, and even. I mean most of the time I just call myself the writer you know?

This excerpt illustrates one more important aspect about identity: the ways in which identity may be 'captured', resemiotized, and ventriloquated. I will briefly address these concepts below (they will be discussed in more detail in later chapters, as well).

6.4.9 Captured Identities: ventriloquism, dialogism, communication and mediation

So far we have seen examples of different categories of identity that I observed at Canango; however, if there is one thing that a Figured Worlds perspective (and sociocultural perspectives more broadly) brings to the study of marketing management it is that we must consider both the ways various identities overlap as well as the ways they are mediated and ultimately experienced across the boundaries of individual selfhood. I will now draw on the concepts of ventriloquism,

dialogism, and mediation originating with Bakhtin, as interpreted by Wertsch (1991), and Vygotsky, introduced earlier in Chapter 2, as well as ideas from Cooren (2020) about materialisation, to illustrate how multiple identities are used by individuals and groups at Canango. Critically, certain identities are used by people who don't necessarily live them in their individual selves, rather they are drawn upon as resources to make certain things happen.

In the above vignette we see how Ted's role identity came to be associated with his former physical location in the workpod area. He had a desk along the window, as more senior members of staff do. When Ivy was given a new position as a senior writer and moved to Ted's window seat, people from other departments came to assume that she was now a manager and had taken over Ted's role. Colleagues began to assume that Ivy was 'the new Ted', leading Ivy to have to actively answer these assumptions and interpretations. However, Ted's identity is not merely *associated* with material artefacts such as window seats, it literally is communicated *through*, mediated *by*, these objects (Cooren, 2020). In other words, Ted's identity is constituted through mediation. Even though Ted is no longer employed at Canango by this time, 'he' is still 'present' in the form of physical artefacts and shared understandings of practise; through figurations which now come to bear on how Ivy is recognized by others in the organisation and one of the ways through which Ivy *exists* at Canango. As Cooren explains:

'Charles Sanders Peirce (1991), perfectly understood this [...] constitutive logic when he implicitly claimed that the world is semiotically constituted. Peirce was both a constructivist and a realist precisely because he knew that relations are as real as the relata they connect and constitute [...] Loved ones are constituted through the photographs that make them appear to you on your desk (icons), a disease is constituted through the symptoms that reveal it to physicians (indexes), and a conflict

is constituted through the comments it later triggers in a hallway (symbols). It does not mean, of course, that these photographs, symptoms, and comments respectively exhaust the modes of being of the loved one, disease, and conflict. It means that they just are one of their embodiments or materializations among many others, that is, one of the ways by which they happen to exist' (2020, p. 11).

I suggest that the example of Ivy and 'Ted' shows that Cooren's reading of Peirce holds for identities as semiotic resources, as well. Moreover, this perspective may be applied to understanding how people's own identity work may be mediated through the construction of new artefacts in practice. Returning to Shirley and her attempts to maintain her Agile organiser/Long-suffering marketer/Software warrior identities. As colleagues from the various program departments approached her directly, as had been done in earlier times, they were acting within the parameters of their understanding of how things work at Canango, in effect their own figured world of Canango. To the program staff it was considered normal to continue to simply walk up to one of the marketing staff and ask them to do something directly; however, this clashed with Shirley's interpretation of a new figured world of Agile marketing which was to be mediated by software such as Freedcamp, an artefact which we shall see in Chapter 8 served as an important resource for Ted's own identity work. In response, Shirley builds her own sense of control, competence and effectiveness through a material artefact; a paper list which partially constitutes Shirley's experience of her own identity. But what of the case in which a colleague was to note Shirley's practice and appropriate it for their own use? Here we may turn to Bakhtin's ideas of multivoicedness and dialogism. According to Bakhtin, everything we say and do originates, to a certain degree, in the utterances and actions of others (Cooren & Sandler,

2014). We create our identities dialogically, in response to what comes before, in addition to what is going on in the moment. Identities seen in this way are thus dependent on what sort of resources or artefacts are available for one to use and what others may allow us to use. In other words ‘identities depend on how people use them; not just how individuals construct themselves by appropriating and deploying different identity labels, but how this is done in *collaboration* with other people’ [emphasis in original](Jones, 2016). Not only does this apply to collaboration with people, however. Figured worlds are peopled by human, material and ideational artefacts as well. Cooren and Sandler (2014) explain:

‘Earlier, we characterized Bakhtin’s notion of dialogic relations as, first and foremost, a relation between persons. This characterization should be qualified: While dialogic relations are indeed interpersonal relations, it does not mean that they are limited to relations between individual human beings. Human beings can be seen and treated as mere objects, but conversely, Bakhtin tells us, objects may be personified—viewed as persons (Bakhtin, 1986 [1979], pp. 138–139)—and may thus also enter dialogic relations; may speak in our actions, utterances, and experiences. In other words, to the question “Who is doing the talking?” (Wertsch, 1991, p. 70, our italics), Bakhtin adds the possibility of asking ourselves “What is doing the talking?” This is what we may call the dialogism of the world’ (p. 228)

We saw these concepts exemplified in the quotes above from Ivy and Shirley about Freedcamp in which they anthropomorphized the software as ‘telling her’ and ‘yelling at her’ respectively.

Another way that identities are captured is through utterances. We saw this in the vignette about the supplied identity, the Agile expert, in which Ivy was indexed as an expert who already came up with the best name for an event and used as a resource by Robin to position the entire department while motivating the meeting attendees to take action, ‘we have experts, let’s use Ivy’s idea’ even though Ivy was not in the room.

Shirley, too, has effectively ‘technologized’ an identity, producing an artefact, a paper list, which now has symbolic and practical meaning. This process produces what I call a ‘captured identity’. It has been resemiotized and has the potential to now be used as a symbolic identity resource by others. In fact this has been the case and we shall see how later in Chapter 9. For now, however, our examples illustrate any identity holds the possibility of being appropriated, resemiotized, technologized and ultimately captured for use as a resource by oneself or others. Whereas in keeping with the view that identities are something one does, rather than one has, captured identities are distinct symbolic objects which may then be *used* as a tool in the construction of figured worlds to subsequently become artefacts of *those* worlds. Let us return to the example of the figured world of ‘bikers’ from earlier. It would be easy to imagine that at one time an individual living out a rebel identity decided that an effective way of expressing this identity would be to tear the sleeves off of their jacket (perhaps they wished to expose their tattoos for dramatic effect?). Regardless of the reason, this symbolic action produced a new artefact: the biker vest and the biker identity had now been captured in a new way, producing another artefact along with certain models of motorcycle, certain motorcycle sounds, and other clothing figuring the world of certain biker clubs representing people who wish to be recognized as a certain type of motorcycle rider, itself a symbol of a certain kind of person.

Moreover, the strength of such identities are materialised by matter of degree. As Cooren, once again drawing on Peirce explains:

'[B]eing or existing is a matter of degree or, as Peirce (1893/1998) points out, "being is a matter of more or less" (p. 2) [...] An organization, for instance, can start to materialize/exist in its founder's mind and some notes she took for herself. But then progressively it could take the form of a business plan, followed by a bank account, loans, employees, spokespersons, buildings, logos, organizational charts, operations, etc. Throughout this materialization process, the organization can be said to exist more and more through multiple forms of embodiments/materializations or "resemiotizations" (Iedema, 2003). At some point, however, it could start existing less and less, through a series of unfortunate layoffs and the progressive reduction of its operations, which could ultimately lead to its termination' (2020, p. 13-14).

Similarly, when identities are understood as being figured through practice, they too are realised 'more or less' through the construction, appropriation and utilisation of more artefacts, more often, in more places, over more time. The more identities are 'used', the stronger they become.

The question which follows, of course, is how are identities used? What is the process that people at Canango follow as they construct identities as resources for the accomplishment of organisational goals? I will begin to answer this question in the next chapter where I develop a heuristic framework that may be used to study identities in use, followed by several contrasting case examples in Chapter 8 which illustrate how the framework may be used to analyse and interpret empirical material relating to how identities are instrumentalized.

Table 6-1. Preliminary Coding Scheme

| Data Extract | Descriptive Code | Interpretive Parent Code | Interpretive Child Code | Affordances or Constraints |
|---|---------------------------------|---------------------------------|--------------------------------|--|
| <p>Events Manager 1: “IT never seems to do anything. Why is it that IT never seems to do anything? Why is it that <i>we</i> have to deal with the compensatory days? Everyone has to put in a certain number of volunteer hours at events.”</p> <p>Events Manager 2: “Our team of three can't do everything.”</p> <p>Events Coordinator: “Other people feel exempt or think they're more important!”</p> | Weekly Debriefing (Events Team) | Emergent Identity | Long-suffering Marketer | Generates sympathy from senior management, while simultaneously bonding with immediate teammates in the face of challenges to commitment to the cause. |
| Data Extract | Descriptive Code | Interpretive Parent Code | Interpretive Child Code | Affordances or Constraints |
| <p>Sam in Operations: So instead of going through marketing, like you're supposed to they just sent the PDF to me and Okay, we'll open her up set up my computer, send it to the copier bing bang done. They</p> | Storytelling | Emergent Identity | Back Door Rebels | This identity produces an eagerness to circumvent authority which is seen to be bureaucratic, and thereby ‘really’ make things happen. |

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| <p>had it in less than a half an hour. Right? Right? But if that went through the marketing department, they, they say okay, no, we need these, these these these first, but she sent it to me when the marketing department was on their lunch break.</p> | | | | |
| <p>Data Extract</p> | <p>Descriptive Code</p> | <p>Interpretive Parent Code</p> | <p>Interpretive Child Code</p> | <p>Affordances or Constraints</p> |
| <p>From researcher notes: At the beginning of the events team meeting, the events coordinators are expressing their frustration over the lack of volunteer participation by the IT department, along with what they perceive to be a general lack of respect or appreciation for how much time the events team puts into both external and internal events. All the while the VP is exhibiting signals that he's listening...lots of "M-hmm..ya..ya...that's frustrating", "What are your most pressing concerns right now?".... His tone of voice is gentle, he adopts a half-smile and tilts his head slightly to the</p> | <p>Listening</p> | <p>Performed identity</p> | <p>Empathetic Manager</p> | <p>Helps keep team onside, builds trust</p> |

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| side while listening and occasionally winces in solidarity. | | | | |
| Data Extract | Descriptive Code | Interpretive Parent Code | Interpretive Child Code | Affordances or Constraints |
| <p>The Fundraising Team, Events Team and Marketing Communications Team are meeting about an upcoming fundraising banquet. There is Indigenous wall art in the meeting room; however no meeting attendees are indigenous. They are discussing the optics of having the event at one site, versus another.</p> <p>Events Manager 1: I don't think we should have the banquet at Sweetgrass Centre (An Indigenous community services organisation) because it highlights the disparity with people who walk in off the street and drink coffee out of Styrofoam cups, so let's have it at the Patterson Hall instead.</p> <p>Creative Director: We need an</p> | Cross functional Meeting | Emergent Identity | The Culturally Sensitive Marketer | Acts as a check against political damage within an important community constituency. Potentially helps prevent insensitive events and behaviours. |

| <p>elder to bring greetings but someone who is part of the program in some way. We can't just "rent" an elder and put them in front of an audience.</p> | | | | |
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| Data Extract | Descriptive Code | Interpretive Parent Code | Interpretive Child Code | Affordances or Constraints |
| <p>Writer: I've been very vocal to Robin and Andrea and Ted about it [...] the problem with Freedcamp is, <i>it doesn't understand</i> like in a day, you know, things come up [...] So all of a sudden [...] there's the Young Entrepreneurs Camp. It seems like it's a long way away because it's October 31. But, you know, like, for instance, I was given the task...<i>Freedcamp told me...</i> that, "<i>oh, you have time this week. so I want two sets of speaking notes then.</i>" And also for Sunday breakfast in November, everything was given an October 11 deadline. And so it's like, well, that's not going to work because, you know, it's a question of my story. So, I don't mind writing a story at home. You know, this, you know, the pod environment is very distracting. It's fun...yeah it's nice to talk to everybody...but sometimes it's</p> | <p>Personal reflection</p> | <p>Emergent Identity</p> | <p>Software warrior/Long-suffering marketer.</p> | <p>In this case the software simultaneously provides a constraint around scheduling but also affords the opportunity to blame the software for scheduling conflicts which gives her license to take it home and work on it without distractions, even though Robin does not want the team to have to take work home.</p> |

| <p>hard to focus. Even with headphones on, you know?</p> <p>Comment from notes: a sense of ongoing pressure of being told what to do “by the software” combined with a distracting pod style environment sometimes leads to taking work home in order to obtain quiet focus, which the writer enjoys because she feels a commitment to getting the story right.</p> | | | | |
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| Data Example | Descriptive Code | Interpretive Parent Code | Interpretive Child Code | Affordances or Constraints |
| <p>Researcher Notes: The meeting between the marketing and fundraising teams is going in circles as they discuss the name of an event. They can’t agree on the name originally developed by the lead copywriter and one of the fundraisers says “Haha talk about making decisions by committee.” The VP of marketing responds in a slightly exasperated tone. “We have experts, let’s use Ivy’s (the lead copywriter) idea. That would be the opposite of making decisions by committee.” The Senior Marketing Project Manager</p> | <p>Cross functional meeting</p> | <p>Supplied Identity</p> | <p>Agile Experts</p> | <p>The Agile Expert identity in this vignette affords Robin and Ted the ability to assert control over the cross team meeting and move the project forward, while reinforcing the marketing team’s expertise and positioning the department for similar engagements in the future.</p> |

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| <p>adds, “Yes, let’s not overthink it, we won’t come up with something better and the clock is ticking”.</p> | | | | |
| <p>Data Example</p> | <p>Descriptive Code</p> | <p>Interpretive Parent Code</p> | <p>Interpretive Child Code</p> | <p>Affordances or Constraints</p> |
| <p>Researcher Notes: Someone from one of the programs has just left the design team after asking for yet another revision of what should have been a simple poster. The VP of marketing walks up to the group of designers and the Senior Marketing Project Manager who are discussing the requested revision and says, “We’re not their agency. How much would we charge them for this? We’re organised! Now they need to get organised upstairs and figure out what they want to do.”</p> | <p>Ad hoc marketing meeting</p> | <p>Supplied Identity</p> | <p>Agile Organisers</p> | <p>This supplied identity affords Robin the ability to rally his team and focus on their goals, rather than allow themselves to be distracted by disorganised colleagues from other departments. Combined with the reference to “upstairs” instead of the name of the department, Robin others a department with a history of last-minute requests that do not fit into Agile project management frameworks.</p> |
| <p>Data Example</p> | <p>Descriptive Code</p> | <p>Interpretive Parent Code</p> | <p>Interpretive Child Code</p> | <p>Affordances or Constraints</p> |

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| <p>Researcher Notes: The “creatives”: on the marketing team display the usual trappings of marketers in roles such as copywriters, designers and creative directors. Their offices and work pods are decorated with colourful art objects, collections of various pop-culture figurines, and ironic odds and ends.</p> | <p>Workspace decorating</p> | <p>Socially Afforded Identity (Socially available managerial and other identities upon which marketers draw in their identity work)</p> | <p>The Quirky Creative (There is a stereotype of the ‘creative’ having desks full of clutter and collections of weird objects, whether to inspire themselves or to advertise their creativity to others. Discussed in many online articles such as https://www.adweek.com/digital/what-digital-creatives-keep-their-desks-poop-emojis-alien-sculptures-and-axes-166496/)</p> | <p>Signals to others that this person is “creative”, “quirky” and “cool”. The objects also serve to remind the “creative” that they are, in fact, creative and keeps them motivated</p> |
| <p>Data Example</p> | <p>Descriptive Code</p> | <p>Interpretive Parent Code</p> | <p>Interpretive Child Code</p> | <p>Affordances or Constraints</p> |

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| <p>Graphic Designer: “I triage everything myself in a paper list because I hate Freedcamp ... I think it’s OK for Ted but it’s not great for me because the deadlines don’t move [in Freedcamp] ... So you’ll just have a list of 20 things that say they’re like 300 days overdue so it’s just constantly yelling at you that you suck at prioritizing anything”.</p> | <p>Personal reflection</p> | <p>Technologically Afforded Identity (Identities made available or constructed as a result of technological artefacts. E.g. identities which might arise as a result of using agile project management software with its specialised vocabulary and structured processes built into the software).</p> | <p>Inadequate/software warrior/long-suffering marketer</p> | <p>Constrains the artist’s ability to work as she would like, leading her to go so far as to operate outside the official channels by using paper to manage projects and feel accomplished, rather than inadequate</p> |
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Chapter 7. A heuristic framework for analysing identities in use

7.1 Introduction

In Chapter 2, I introduced an extended definition of identity work that moves beyond the mainstream view of identity work, as working *on* identities, to consider that another way that we engage in identity work is to *use* identities to *do* things. I further noted that I would present a framework that researchers could use to systematically study how people use identities in reference to the figured worlds of which they are a part. Chapters 4 and 5 looked at a variety of marketer-related identities that may variously emerge or be supplied in the context of doing marketing work of different kinds. In this chapter I add to my earlier discussions of Pragmatism and Figured Worlds theory to develop my framework called the *5-M Identity Use Framework*, made of the elements ‘*matter*’, *meaning*, *mediators*, ‘*me*’, and ‘*motion*’ (each will be defined later) in advance of Chapter 8, where I will apply the framework in the context of Canango to explain how Ted, Shirley, and Sam do things with identities as they attempt to accomplish things in their day-to-day work.

In developing the 5-M framework, in addition to ideas from Pragmatism and Figured Worlds theory, I borrow from Van Leeuwen’s (2005; 2008) social semiotic approach to social practice analysis and Scollon’s mediated discourse analysis, two complementary approaches to multimodal discourse analysis (see Figure 7-1). I will next discuss both of these approaches and how they can help to operationalize analyses undertaken within a larger Figured Worlds framework.

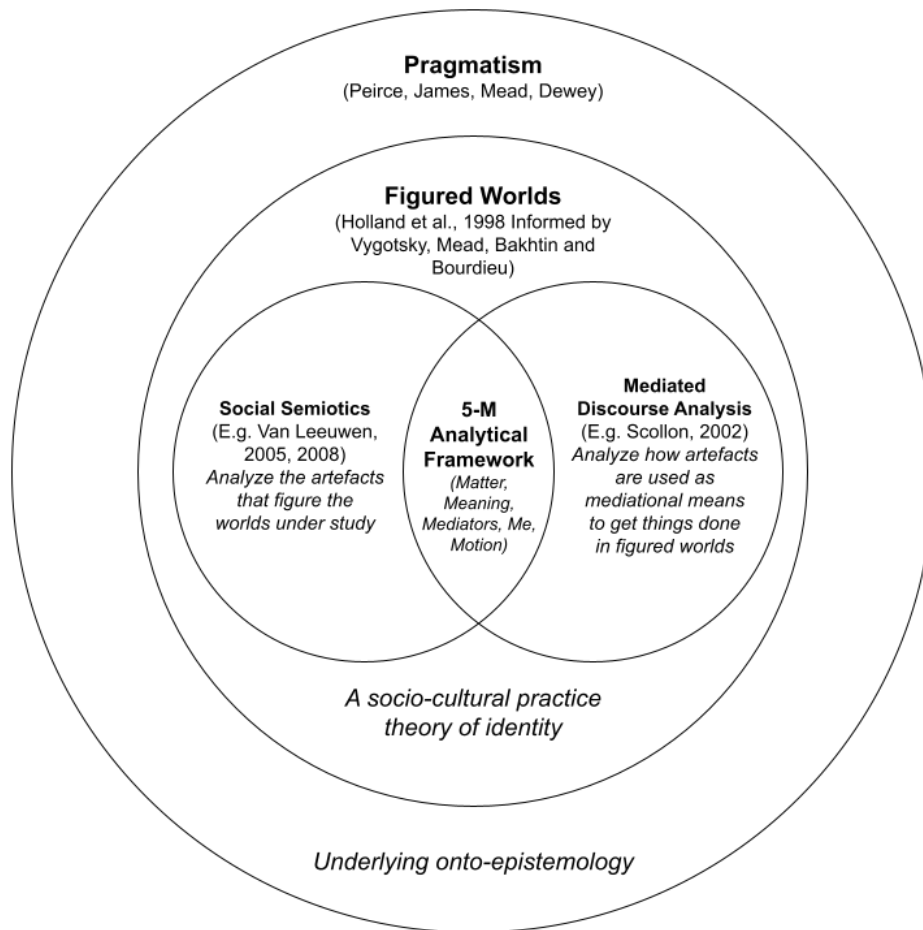


Figure 7-1. Theory map of my framework for the study of identities in use. Pragmatism underpins the hybrid use of multiple streams of compatible literature and focuses attention on identity work outcomes; Figured Worlds provides a frame of reference for how people think about the worlds they inhabit; social semiotics and mediated discourse analysis provide ways of analysing and interpreting empirical material that helps identify the artefacts and mediational means which define specific figured worlds and which ones (including different sorts of identities) are used as tools and resources to get things done in response to phenomena.

7.2 Multimodal discourse analysis

As detailed in Chapter 2, Figured Worlds theory is a social practice theory of identity rooted in a cultural historical view of psychological processes and language as articulated by Vygotsky and

Bakhtin. As such, we may benefit from studying this view of identity using approaches which help us understand practices as well as ideas that define Discourses about them (Van Leeuwen, 2005). The recognition that the analysis of Discourse must move beyond the limits of language and narrow definitions of the ‘text’ has grown steadily over the past two decades (Tan, et al., 2020). These developments have led to the interdisciplinary field of *multimodality*, which includes a number of subfields which may be grouped under the heading *multimodal discourse analysis* (Norris, 2012). I adopt specific ideas from two of these, *social semiotics* and *MDA*, in developing our framework. These two perspectives, which complement each other theoretically, nonetheless approach the social world from different angles, with social semiotics originally coming from a linguistic perspective and MDA coming from a mediated action perspective (Norris, 2012). I briefly discuss each approach below, outlining how they complement each other and provide tools and insights which underpin the more practical aspects of my framework.

7.2.1 Social semiotic view of discourse practices

Social semiotics is a unique approach to semiotics pioneered by Gunther Kress, Bob Hodge, and Theo Van Leeuwen, among others. What sets social semiotics apart from traditional structural semiotics is the transition from a focus on ‘the sign’ to instead look at ‘semiotic resources’ (Van Leeuwen, 2005). Semiotic resources are those things (material and non-material) which are *used* as meaning-making tools in communication. Hence, the ‘social’ in social semiotics (Van Leeuwen, 2005).

Practically speaking, social semiotics studies the similarities and differences among semiotic modes (e.g. gesture, gaze, colour, sound, placement) and how they are used as resources for

meaning making in communication (and thereby, when viewed through a Figured Worlds lens, identity deployment in figured worlds). Semiotic resources have no inherent abstract meaning; rather, they receive their meaning by their use in specific contexts (Van Leeuwen, 2005). In other words semiotic resources may be seen as ‘motivated sign[s]’ that are used for a reason (Jewitt et al., 2016, Ch. 7, Table 7.1). Thus, every semiotic resource has *meaning potential*. Specific contextual meanings are regulated through social practices, legitimacy conditions and normative regimes (Van Leeuwen, 2005), paralleling meaning making in figured worlds.

MDA looks at semiotic resources from a different angle: the *actions* that are taken with them. What we have seen called artefacts and semiotic resources earlier, MDA sees as *mediational means* through which people make things happen and get things done. As Scollon explains:

‘The underlying principle of mediated discourse analysis is that discourse cannot be studied in isolation from the situated social actions that people take with it [...and...] not automatically privileged as an object of study, but only seen as important insofar as it relates to concrete actions in the world; discourse is simply one of the many ‘cultural tools’ with which individuals take action and which link them, through these actions, to their socio-cultural environments’ (Scollon, 2008, p. 229).

MDA has thus been described as being interested in discourse *in* action, rather than discourse *as* action as is more common in earlier critical discourse analysis (Nicolini, 2012). MDA sees action not in isolation but rather as wholly entwined with discourses already at work in a given context as they make their presence felt via multiple modes including speech, gestures, sounds, office layouts and so forth, paralleling the discourse and practice perspective of Van Leeuwen (2008).

7.2.2 Mediation Means, Cultural Tools, and Technologies

Like Figured Worlds theory, MDA takes a Vygotskian perspective on mediational means (Scollon, 2001). Mediational means may be anything from material objects to ideas or habits, which also means they have histories and bring along broader societal discourses, ideologies, various perspectives, and power relations which may be knowingly or unknowingly present on the part of the agent (Nicolini, 2012). Eventually mediational means may come to be understood as a practice within a particular culture, and move beyond simply being a mediational means to becoming a ‘cultural tool’ (Wertsch, 1991; Jones, 2016). After a tool has been appropriated by a community, ideas about how it should be used or not and by whom, may arise and particular techniques of use will be developed and perfected at which point the cultural tool becomes ‘technologized’ (Jones, 2016; Scollon, 2001) and may evolve further into different technologies as people improvise its use and deploy it within the limits of its affordances (Gibson, 1986 in Jones, 2016) and constraints. For example, a microphone may allow one to speak clearly at a distance while making it more difficult to speak privately with people nearby (Jones, 2016). Crucially, like the case with Van Leeuwen’s (2008) legitimacy conditions, affordances only have meaning if the person wishing to use the tool has the effective ability to use it (Gee, 2014a). So, for example, the potential of an aeroplane to fly is only an affordance to a pilot, not a pig and a microphone only works if it is plugged into a complete public address system.

The transformation and re-deployment of mediational means further gives rise to the concept of resemiotization (Iedema, 2003, Scollon, 2008) as an additional potential tool for identity work. Re-semiotization is the process of shifting meaning making activity from its original, usually more fluid form such as talk, into new modes which are usually of a less fluid form, such as a

written text, electronic medium, formal procedure or, designation which may change and reify important aspects of the original (Iedema, 2001). Iedema explains as follows: ‘Resemiotization is about how meaning making shifts from context to context, from practice to practice, or from one stage of a practice to the next [such as] within the context of an ‘ordinary’ bureaucratic process’ (Iedema, 2003, p. 41). Take the example of a person reading a book about plumbing. One may read the book and apply the information in one’s home renovation project as a ‘home handy-person’; however, if one reads the book as part of a class at a polytechnic, follows up working as an ‘apprentice’ under the guidance of a ‘master plumber’, then passes exams, one moves beyond being an apprentice to be resemiotised as a ‘journeyman plumber’ as attested on a certificate. Moreover, as Iedema explains, such processes ‘[stabilize] specific meanings and in doing so [resemiotize] those meanings into more durable manifestations (2003, p. 35). Once plumbers have passed their exams, they cannot un-take them.

Closely related to resemiotization is the concept of *entextualisation*, which Jones defines as ‘the process through which actions are turned into semiotic mediational means for taking subsequent actions’ (2009, p. 287). Entextualised actions are thereby able to be deployed across space and time (Norris, 2004 in Jones, 2009) via media or ‘technologies of entextualization’ (Jones, 2009). Like all technologies, these technologies also have different affordances and constraints (Jones, 2016) and as actions become entextualised they add to the store of resources available for identity practices. Combined earlier with Cooren’s (2020) reading of Peirce on reality by degrees, one may see how identities may be made more present and potentially more effective by bringing to bear more identity resources in a given situation.

7.2.4 Tools of analysis

Given the above positions on semiotic resources, mediational means and discourses in action any framework that hopes to help us study how people deploy identities must therefore help capture and analyse empirical material about these elements. As Van Leeuwen (2005) says about social semiotics: '[it] is a form of enquiry. It does not offer ready-made answers. It offers ideas for formulating questions and ways of searching for answers' (p. 1). Social semiotics is thus a useful adjunct to Figured Worlds theory which offers only general methodological principles, essentially emphasising ethnographic approaches (not a surprise given its origins in cultural anthropology). Social semiotics provides specific methods, tools and techniques, and as Van Leeuwen suggests, above, that is arguably the point.

Usefully for this thesis, Van Leeuwen (2008) developed a framework that lets us 'explore the relationship between social practices and discourses about them, and thereby [...understand...] how discourses affirm, challenge or subvert the social order' (Djonov and Van Leeuwen, 2018, p. 655). Although there appears to be no cross-referencing of Van Leeuwen's work on practice and Holland's work on Figured Worlds, a look at Van Leeuwen's framework while keeping the concept of figured worlds in mind suggests how it could be useful in analysing the artefacts that both define, and are defined by, figured worlds.

For Van Leeuwen, '[t]he components of a social practice include:

- social actor/s, or participants
- physical and/or semiotic activities performed by the social actors

- times(s)
- location(s)
- performance modes (the manner in which the activities are completed)
- presentation styles of the participants
- resources (tools and materials)' (Djonov & Van Leeuwen, 2018, p. 655).

Some of these components, specifically participants, locations, and resources, are subject to 'eligibility conditions' which qualify specific resources to be included in the practice, similar to how certain artefacts define particular figured worlds and how their absence or substitutions with the 'wrong' artefact invalidates one's actions or participation (Gee, 2014a). Van Leeuwen (2005) also points out that practices are regulated by 'semiotic regimes' such as the authority of powerful people, religion, forces of everyday social conformity, or the influence of role models and experts (p. 53). Such regimes develop over time but vary by context. Also, as noted above, studying social practices requires us to also consider ideas about them. For Van Leeuwen (2005) ideas generally fall into three categories: evaluations (which have a values component), purposes (reasons why), and legitimations (which we can link back to eligibility conditions and normative regimes). Finally, one may better understand how social practices change by noting the various '*additions, substitutions, deletions, and rearrangements*' (Djonov & Van Leeuwen, 2018, p. 655) that occur among the components of practice over time.

The above concepts are applied in a 'social practice analysis' (Van Leeuwen, 2008, Ch. 1) where the analyst produces a matrix in which to record parallel streams of actions, participants and their eligibility conditions, presentation styles, times, locations, resources, normative regimes, (and to

which I also add entextualisations and resemiotizations) and thereby map the ways in which social practices are recontextualised and worlds change over time.

7.3 Bringing the perspectives together

Now that I have discussed my chosen theoretical positions individually, here and in Chapter 2, I will bring them together into a heuristic framework that can be deployed to gather and analyse empirical material about how people put their various work identities to use in and through figured worlds.

7.3.1 Commonalities

Several antecedents link the various streams together. For example, Figured Worlds theory draws on the activity theory of Vygotsky. MDA meanwhile draws on Vygotsky as well as ideas from Van Leeuwen's social semiotics which each look at the resources that are used in identity work from different angles. The Pragmatist outlook, meanwhile, lines up with, and can be used to support, Figured Worlds theory and social semiotics, both in terms of an openness to hybridity and how identities may be built up by degree through the deployment of progressively more resources. Therefore I will now consolidate a number of assertions about identity, how the social world 'works', and how we can study the way people put identities to use based on the ideas presented up to this point:

1. When things happen, they emerge from webs of prior phenomena (e.g. Gee, 2014a; Holland et al, 1998; Scollon, 2001).

2. Phenomena have symbolic value and may be used as resources for communication and meaning making (Lorino, 2018; Van Leeuwen, 2005).
3. People make sense of change through the interpretation of salient symbols (James, 1907) which have both histories and potential meanings (Scollon, 2001; Van Leeuwen, 2005) and which are intertwined with, and supplied by, the figured worlds of which they are a part (Gee, 2014a; Holland et al, 1998).
4. Identities are not things that people *have* so much as ideas they live out or *do*, for reasons which make good sense to them, within recognizable worlds (Jones, 2016; Holland et al, 1998). They are ‘about being recognized as a certain kind of person in a given context’ (Gee, 2000, p. 99); *however...*
5. Given their ideational character, identities are also things that may be supplied, and defined by others through the deployment of significant symbols which one may then appropriate or resist (Jones, 2016; Watson, 2008).
6. An identity may also serve as a semiotic or communicative resource just as any object, process, or other ideational or material resource does (Jones, 2016; Van Leeuwen, 2005). Importantly, the ‘existence’ of an identity is a matter of degree, taking on greater presence and impact as more identity resources are realised and deployed (Cooren, 2020).
7. People’s relationship to their worlds is mediated and people take action through mediational means (Scollon, 2001; Vygotsky, 1978), which originate as artefacts supplied by the worlds in which people participate but the use of which is improvised according to the requirements of the situation at hand (Holland et al, 1998; Kress, 2010; Scollon, 2001; Van Leeuwen, 2005)

8. When people act through the use of a mediational means both the world and the mediational means are changed (Farjoun et al, 2015; Scollon, 2001; Vygotsky, 1978).
9. *Identities* may also serve as mediational means and, like all mediational means, have affordances and constraints which either advantage or disadvantage certain kinds of action (Jones, 2016); *however....*
10. People are positioned in figured worlds and how much agency they have to author and deploy identities within those worlds is enabled or constrained by the sociocultural implications of that positionality, whether related to material artefacts or the positionality and agency of others who also inhabit the same world(s) (Holland et al, 1998).

Working abductively, given the above statements, if one were to look at how someone used an identity to accomplish some sort of situationally meaningful goal in response to a situation, they would have to account for, and attend to, the following elements:

1. The situation-defining phenomena, their histories, and the immediate context (Which I figuratively call *matter*)
2. What the phenomena mean to the people for whom the situation is salient (I label this element *meaning*)
3. The *mediators* people use to make sense of and act upon the situation
4. How the mediators change the world(s) and thus the potential identity(ies) of the people affected by the situation; identities which *also* become mediational means through which to act and be recognized (I call this element *me*)

5. How people then deploy a given identity as a means to action within the limits of their ability and positionality within relevant world(s) (labelled *motion* in my framework)

7.4 Using the 5-M Framework

The elements of the 5-M framework provide a simple heuristic to organise an analysis of how people use identities to accomplish goals. Each element draws on different aspects of my main theoretical sources to a greater or lesser extent, which further suggests specific ways one may wish to apply the framework (See Figure 7-2). Here is how one might apply each element in the framework, along with their implications for analysis of how identities are used in a given situation:

Beginning with the element *matter*, it is important to remember that phenomena follow historical trajectories on their way to having effects which are real regardless of standpoint. Moreover, as already discussed, phenomena are not merely ‘things’ but also symbolic carriers of meaning and subject to interpretation as they give rise to different effects. Analytical implications: *At this stage attend to context, mapping out Van Leeuwen's components of practice to define the operative figured worlds and the trajectories of events.*

Next, one must gain some understanding of the *meaning* of the situation to the people in a study. Since meaning is seen as multi-voiced (Wertsch, 1991), embodied (Gee, 2020), and embedded in the anticipated consequences of action (Lorino, 2018) one must attend to the past, present, and possible futures from the perspective of the study participants which are relevant to the situation. Analytical implications: *Review interview transcripts and observational field notes, to get a*

sense of the operative histories of the people, places, and things involved (Holland et al., 1998; Urrieta, 2007). Attend to any effects that changes in the situation have had or are anticipated to have by the participants.

One must also look more deeply at the components of practice that were mapped under *matter* to identify the salient *artefacts* within the various figured worlds in play. One looks at the meaning potentials and how they might serve as *mediators* (Scollon, 2001; Van Leeuwen, 2008). Analytical implications: *Ask questions such as, What modes are active in these artefacts? What are their affordances and constraints? Work abductively and ask, what would have had to have been the case, or understood as 'normal', in order to give rise to a given situation?*

The mediator or mediators are referenced to index one's membership within one or more salient figured worlds as people work to be recognized as as certain kinds of people in those worlds (e.g. Gee, 2014) or to use Mead's (1934) terminology a *me*. This identity is outward facing (Simpson, 2009) with affordances and constraints of its own, and is thus also a tool that may be used to get something done (Valdez, 2006 in Valdez and Omerbašić, 2015). Furthermore, as implied by Peirce (1898 in Cooren, 2020) it exists to a greater or lesser degree by virtue of the number of identity resources which are deployed in its construction and use. Analytical implications: *Seek answers to questions such as, What identities are available? Which identities are appropriated and performed? Which ones are not, and why? What is the semiotic potential found in these identities in the figured world(s) of interest? What are their affordances and constraints? Which voices are ventriloquated in identity performances? (E.g. is the participant using the language of IT? Marketing strategy? Accounting?) What spaces of authoring are made available? By whom?*

Attending to Van Leeuwen's (2008) list of semiotic regimes and mapping the eligibility conditions of the components of practice may also serve as an initial guide to analysis. The affordances and constraints offered by the identity are leveraged to take action, (*motion*), within the limits of one's abilities (Gee, 2015; Gee in Jones, 2016). These actions produce new phenomena (Jones & Norris, 2005) and identity work in an ongoing recursive process (see Figure 3). Analytical implications: *What actions are taken? What modes are used to take action? What or 'who' is resemiotised? Who is entextualised? What additions, deletions, substitutions, and rearrangements are in evidence as a result of the action? How were people positioned or repositioned? What spaces of authoring were exploited or changed? What was changed in the figured world so as to achieve the goal?* Answers to questions like these will uncover the flow of ideas and activity that describes how an identity was used toward a specific end.

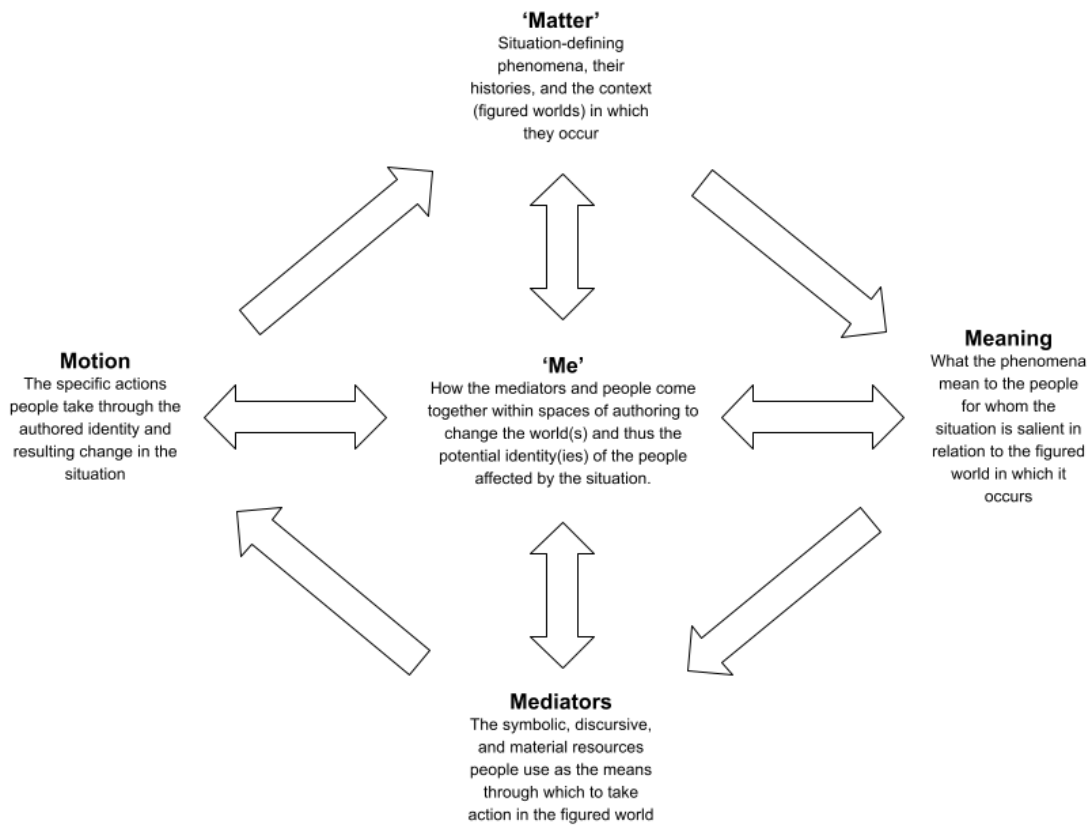


Figure 7-2. The 5-M framework for analysing identities in use. Each element serves as a heuristic for focusing attention on key aspects of identity and agency in relation to phenomena as interpreted within figured worlds. The outer arrows suggest a temporal order for analysis while the bidirectional arrows connecting the central 'Me' serve to remind researchers of the co-constitutive, reflexive nature of identity construction and deployment.

In sum, my framework sees identities not in essentialist terms but rather as ideas that we express through the artefacts which define figured worlds, allowing us to be seen as certain kinds of people and thereby set the stage to take action toward our goals. The 5-M identity use framework thus offers a starting point — in effect a tentative theoretical coding frame — to help researchers

attend to the relevant details of the figured worlds in which phenomena occur, including the people who define and are defined by those worlds, and what they do in them.

7.5 Discussion

In Chapter 2, I noted the major criticisms directed at the most popular theoretical approaches adopted in identity work research in management fields, many of which challenge reductionist or overly narrow identity foci common to some mainstream traditions. In contrast my approach essentially ‘automatically’ deals with many of the criticisms cited by Brown (2021) because of its pragmatic hybrid nature. As Brown argues, ‘[r]ecognition of an emergent identity work perspective is valuable because it serves an integrative function’ (2021, p. 18). I agree; however, my framework, concerned as it is with mediated action within figured worlds, ensures that scholars studying identity work attend not only to how people work *on* identities but what they do *with* them, *other than* work ‘on’ them. My framework is thus able to look at identities within figured worlds that are defined by roles which are of interest to RT/IT scholars. The concept of spaces of authoring and positionality may be used to focus on issues of who is in and who is out, of interest to SIT scholars. Meanwhile the narrative aspects of figured worlds, which include the stories that people tell themselves and each other about what is ‘normal’ within any given figured world will resonate with researchers interested in the narrative identity theory approach.

Brown also notes that identities scholarship has sometimes been criticised for being disengaged from ‘issues of power, reflexivity, emancipation and agency/structure debates’ (2019, p. 17); however, a Figured Worlds perspective looks at identities explicitly through a lens of positionality, space for agency, and the possibility of changing figured worlds through activity

over time. As a result, Figured Worlds is a body of theory tailor made for marketing management scholars interested in the intersection of identities and power relations. Meanwhile the stories and imaginaries which underpin figured worlds are seen as doing so in deep reference to a broad range of histories, Discourses, symbolic resources and action which add depth and richness to the analysis of narratives at work in people's efforts to work both on and *with* identities.

The 5-M framework also manages to overcome many of the criticisms of symbolic interactionism which also apply to approaches such as RT/IT which have roots in this tradition (Brown, 2021). Symbolic interactionism, although based on a selective reading of Mead's ideas, moves away from his more holistic view grounded in transaction involving transformation of the entire situation to focus instead on the interaction among individuals (Simpson, 2009). Whereas symbolic interactionism has been called out for a too narrow focus on local interaction (Ritzer & Stepnisky, 2022), my framework guides one to attend to the earlier historical trajectories of persons and the mediational means that are used to enact identities within and through the co-construction of figured worlds.

7.6 Conclusion

The 5-M identity use framework offers management scholars an alternative way of thinking about and studying identity work by conceiving of identity work as working *with* identities as mediational means and semiotic resources to change worlds, *in addition* to the usual working *on* identities. This extended understanding of identity work to include how people 'do' identities is made possible by bringing together the social practice theory of identity known as Figured Worlds (Holland, et al, 1998) with ideas about Discourses in practice from Van Leeuwen's

(2005; 2008) version of social semiotics and from MDA (Scollon, 2001). These theoretical approaches have rarely been adopted within management research, while seeing popularity in other domains such as anthropology, education, applied linguistics, and others. My framework attends to five elements: '*matter*' (a figurative term to describe phenomena whether material or non-material which are always experienced within or in reference to figured worlds); '*meaning*' (what the phenomena mean to people, generally understood in reference to their effects, whether in the past or ones imagined future); '*Mediators*' (The various semiotic and discursive resources that are supplied by a given figured world and that people use to make sense of and act upon the situation); '*Me*' (How the mediators may be used to change the world(s) and thus the potential identity(ies) of the people affected by the situation; identities which *also* become additional mediational means through which to act and be recognized by others); '*motion*' (How people then deploy a given identity as a means to action in light the identity's affordances and constraints).

Corlett et al. (2017) suggest a number of ways researchers may deal with the seeming incompatibilities among the many ways of understanding identities. One way they suggest is the 'get above' (or below) it; to, in other words, transcend the differences or unify them. My approach does both, placing the focus on practice but in a way that integrates the symbolic with the discursive, without denying the validity of existing streams of theory. The 5-M framework urges researchers to attend not only to 'texts' but to history, dialogue, positionality, and action as people live out identities and change the worlds of which they are a part.

The next Chapter demonstrates how to use the 5-M identity use framework as I apply it to the ways that Ted, Shirley, and Sam use identities in response to the digital transformation of marketing at Canango.

Chapter 8. How marketers use identities to do things

8.1 Introduction

In Chapter 7 I developed a framework based on Figured Worlds theory, Van Leuuwen's (2005; 2008) social semiotic approach to analysing social practices, and Scollon's (2001) mediated discourse analysis to help analyse how to study the ways that people use their (and other's) identities to do things. In this chapter I will apply the framework to Canango and look at how three different people used their identities in light of the shift from what I have been calling an 'NGO helper world' to an 'Agile marketing' world. I will begin by engaging in a social practice analysis and semiotic inventory as described in the last chapter to detail the NGO and Agile marketing figured worlds. Then I will use the 5-M framework to trace the ways in which Ted, the project manager, Shirley, the junior designer, and Sam the operations manager, act in relation to the Agile organiser identity that was supplied by Robin and Ted. Ted, Shirley and Sam will all be seen to make use of different available artefacts from inside and outside the Agile organiser world to enact various identities and achieve individual goals.

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Chapter 6 briefly outlined the various artefacts that are generally considered to define Agile marketing as described by several authors (e.g. Brinker, 2016; Chaffey and Ellis-Chadwick, 2019; Edelman et al., 2016; Smart, 2016), such as triage, iteration, testing, daily stand-up meetings, face-to face work pods, and Kanban boards. In this chapter I will inventory the artefacts which define Agile marketing as practised by Ted and his colleagues at Canango, as

well as map the ‘indeterminate situation’ (Dewey, 2018/1938), discussed in Chapter 2, which in this chapter is defined as the shift from the old NGO world to the Agile marketing world. This shift is the centre around which my analysis of how Ted, Shirley and Sam use their identities will revolve.

8.2 Canango goes ‘Agile’

Agile marketing is not limited to a single standard approach and is sometimes said to be a ‘mindset’ as much as a methodology (Ewel, 2021). Every site that implements Agile marketing will do so in its own unique way. Canango is no different and thus it is possible to see how the marketers at Canango have put their own stamp on Agile.

I shall begin by looking at the first element in the 5-M framework, ‘*Matter*’ (See Figure 7-2 in Chapter 7) and inventory the artefacts which define the earlier NGO helper world and the Agile marketing world to see what changed. I will then look at what these changes meant for Ted, Shirley, and Sam by tracing their responses through their activities and use of available semiotic resources to index and deploy various selves, along with the underlying assumptions supporting their actions, moving through each element of the 5-M framework. Readers are invited to follow along in Table 8-1 which summarises the analysis for each 5-M element. Table 8-2 breaks out the *components of practice* which define the transformation of practice across the shift from the NGO world to the Agile marketing world, while Table 8-3 details a social practice analysis for one key artefact within the world of Agile marketing, the Kanban board (See Exhibit 8-1).

It is important to keep in mind that the terminology I use to describe the various artefacts that I, in turn, use to describe the figured worlds in my analysis are not part of the usual vocabulary of Figured Worlds research but rather comes from Van Leeuwen's social practice analysis framework. I argue that Van Leeuwen's typology offers structure that is helpful in doing comparative analyses of different worlds and how they are transformed. In any case as a social practice theory of identity, Figured Worlds syncs well with the categories, such as normative regimes and resources named by Van Leeuwen (2005; 2008).

8.3 'Matter' – moving from the world of the NGO helper to the Agile marketer

I refer the reader to Table 8-2 for a detailed inventory of the artefacts which I will next summarise in narrative form. I will compare the NGO helper world to the new Agile marketing world by looking at the following components of practice: *Actors; Activities; Times; Location/s; Presentation style; Performance mode; Resources; Additions; Deletions; Substitutions; Rearrangements*; and, *Normative regimes/eligibility conditions*. For each component of practice I inventory the artefacts out of which they are constructed, offering a view of the phenomena which define the figured world in which the 'indeterminate situation' (the shift to Agile marketing) will be interpreted and which defines the element 'Matter' in the 5-M framework.

Starting with *Actors*, the shift to Agile marketing was accompanied not only by a shift in activities but also by a concurrent expansion of the department as the organisation sought to shift marketing activities away from program staff to dedicated marketing staff. A key change was the creation of Ted's project management role; however, other changes included the addition of

another designer (Shirley) a digital content specialist (Finn) and a new coordinator position on the events team (Siobhan). A new creative director position oversees the day to day approvals of all content. The printer position (Sam) was changed to an operations role and moved out of the marketing department with the selling of the offset printing equipment and a greater emphasis on digital content.

8.3.1 Activities

The processes of getting work done, or the *Activities* in the NGO world, are characterised by a ‘helping’ ethos. Members of the marketing team participated across projects, with everyone providing input on most projects, whether designers commenting on copy or writers making suggestions about design. Ultimately the team did what was asked of them by the program managers and the team worked on projects more or less as they were received, rather than prioritising one department's project over another in a systematic way. In the Agile world, the same activities occur; however, they are now handled individually with less interaction across roles and all work is mediated by Ted. Agile also introduced new practices; namely, the daily stand up meeting, the posting and selecting of tasks on a Kanban board, and regularly scheduled planning meetings between marketing managers and program managers, akin to a ‘scrum’ or sprint planning session in the software development world where, as has already been noted, the Agile methodology originated. Shifts in activities and decision making roles also meant that a shift in *Times* occurred.

8.3.2 Times

In the NGO world the various program managers directed their own communication activities and would bring projects to individual designers to work on, rather than to a supervising project manager. All of this changed with the establishment of the project manager role and the introduction of Agile marketing. Robin's goal was to position the department as a team of experts, organise the marketing activities across Canango, and execute larger plans developed by senior management prioritised according to larger strategic objectives and revenue potential. As a result the marketing direction was now set by Robin, Ted and Andrea, who would meet with program managers separately from the creative team. Projects would then be prioritised and assigned by Ted and creative approval was provided by Andrea. Individual creative staff would work within their area of expertise according to what was assigned to them. Progress was monitored through daily standup meetings and by Ted walking around and asking where different pieces of creative were in the production pipeline. Projects were ostensibly assigned via Freedcamp teamwork software, but as we shall see this software proved to be a significant source of frustration for the creative staff. Project communication more often ended up happening via e-mail or simply by talking over the workpod walls. Later Ted implemented a physical Kanban board as a way to organise, assign and communicate work. The Kanban board will be further discussed when using the 5-M framework to analyse how Ted deploys his agile organiser identity.

8.3.3 Location/s, Presentation style, Performance mode

In the NGO world, some marketing work occurs in the program departments where initial decisions are made. Several programs are on the same floor and near the marketing department

in the Canango office building. Other departments, such as fundraising, are on the third floor with the executive offices and work is brought down to the marketing team which essentially produces what the program managers ask for. In the world of Agile marketing in contrast, decisions are made in meeting rooms on the third floor in consultation with Ted, Robin and Andrea. Program managers do not directly interact with creative staff. The work is more compartmentalised, with different roles playing out in different areas of the building and at different levels within the building. More decisions are made ‘upstairs’ and work is ‘brought down’ to the creative workers who apply their expertise to their own job at hand. Meanwhile work is assigned and prioritised by Ted and Robin in consultation with program managers according to larger strategic plans as well as occasionally the needs of large donors, who are referred to as ‘clients’ and ‘accounts’. Day to day creative work happens in work pods at individual desks; however, daily stand up meetings happen around Ted’s work table where people stand during the meeting and report aloud on project statuses. The Kanban board where some projects are assigned and taken up is placed in a central area visible to everyone and the selection and later the marking of projects as complete is visible to everyone on the creative team from their places in the work pods. Printing work is no longer performed on an offset press by a press operator who is part of the marketing team. Rather, printing is now output to digital copiers in the operations room where Sam, the former press operator, is now in charge of fulfilment operations and the assembly of marketing materials, essentially servicing the marketing and programming departments as needed. This work occurs on the lower level of the building.

8.3.4 Resources

I will not list a complete inventory here, referring the reader to the ‘Resources’ row in Table 8-2 I

will discuss the use of specific resources in the individual vignettes illustrating how Ted, Shirley and Sam use their identities to accomplish work in light of the shift to Agile.

8.3.5 Additions

The shift to Agile saw the introduction of several new positions corresponding with the increased role for the marketing team overall, in particular their responsibility for initiating more of the Marketing activities independently of program managers. These positions included a director of communications role, a digital content coordinator and an additional event planner, in addition to Ted's new project manager role

Importantly Ted introduced a number artefacts which are defining figurations of current Agile methodologies, namely: Agile project management software, a physical Kanban board, project triaging, and daily stand up meetings. This last artefact also speaks to the introduction of personal accountability for delivery and quality rather than in Robin's words, 'Everybody doing everything and nobody being responsible for anything'. Meanwhile, triaging projects means that some programs will have their projects placed in a queue if they are not deemed critical at the time. The result is that Ted spends considerable time communicating revised timelines and managing the expectations of program managers

8.3.6 Deletions

The introduction of Agile was less a case of eliminating existing artefacts and more of a case of adding new ones. The old NGO world still exists in the minds and to a lesser extent, the practices of various people at Canango. That said, the new emphasis on output and accountability did lead

to the removal of one designer who did not meet the new more sharply defined performance standards of the Agile world.

8.3.7 Substitutions

A significant substitution was the hiring of Robin as a vice president of marketing, now a member of the senior executive team of Canango. The previous marketing director position was not as senior and the marketing director role was focused more locally at the departmental level, rather than at a higher strategic planning level. The result, of course, is that Robin had a mandate to introduce significant change to the department and the role of marketing in the organisation as a whole. One outcome of this change led to an additional substitution when one writer left the organisation because of dissatisfaction with the new direction away from the NGO world to the Agile world. The resulting vacancy was filled with a new designer instead of another writer. Finally, a significant substitution in practice was the introduction of collaboration software which was intended to be used to communicate about projects ‘on the fly’ as a substitute for many face to face meetings and negating the need to get up and walk over to the desk of a colleague, ostensibly ‘wasting time’. As will be seen later, however, the initial software application chosen by Robin and Ted was not embraced by the marketing team leading to various improvisations and identity enactments.

8.3.8 Rearrangements

As noted above, and discussed in detail below, one rearrangement was the shifting of the printer or press operator position out of the marketing department to work in a new ‘operations’ role. Other rearrangements include the communication processes between the marketing department

and the program managers which sees creative staff no longer meeting directly with program managers who now meet with Ted, Andrea, and Robin who then communicate work tasks to the creatives who function more as expert technicians rather than as members of the broader organisation.

8.3.9 Normative Regimes

The above social practice mapping indicates the presence of several normative regimes at work (on the part of the senior managers and ultimately the Canango executives) which have led to the ‘situation’ under study. The NGO world is regulated by a general co-operative helping ethos defined by group responsibility, relatively soft boundaries between roles and more under the direction of frontline program staff. The Agile marketing world (as defined and introduced by Robin and Ted) sees Productivity, flexibility and quickness as the goals, incentivized through practices and structures that produce individual accountability; this shift was enacted through boundary construction (Individual ‘Agile expert’ and ‘Agile organiser’ identities) and Agile project management tools such as triage, daily stand-ups, and Kanban boards supplied by Robin and Ted.

We thus see an organisation in which two different figured worlds operate in parallel and to varying degrees, setting up different responses and identity deployments inside and outside the marketing department, as will be discussed next.

8.4 The meaning of the indeterminate situation

The next element in the 5-M framework is ‘*meaning*’. I will now look at what the shift to Agile

marketing (the indeterminate situation) means to workers at Canango. I will focus on three contrasting individuals: Ted and Shirly, who we shall see find different ways to deploy the Agile organiser identity described in *Chapter 6*, and Sam, who finds creative ways to be ‘agile’ without embracing the Agile organiser identity of the world of Agile marketing.

In the last chapter I adopted a view of meaning as residing in people’s experience of (or anticipation of), the consequences of phenomena and communicated through the use of semiotic resources which are understood in relation to the underlying assumptions at work in figured worlds. As noted in Chapter 5, Ted, Shirly, and Sam have quite different work histories and perspectives, and thus see the shift to Agile marketing differently.

8.4.1 What does the situation mean to Ted?

Ted sits at a desk in the centre of the group of workpods housing the marketing department. His work area is decorated with various creative objects: a hot sauce collection, an antique typewriter, action figures. His side shelf features his name and job title. His large double computer monitors sit along the window overlooking the parking lot and his back faces the rest of the work pod and the second floor of the building. During the morning stand-ups he stands at a high work table and faces the rest of the marketers who gather in the pod he shares with Ivy. Throughout the day he is often standing while holding print outs of spreadsheets and project briefs, monitoring what other team members are doing, telling the occasional joke, and asking for ideas and input over the work pod walls. The other marketers work quietly at their desks most of the day but Ted is more mobile, except while he is adding job tasks in Microsoft Project or

Freedcamp. Robin's goal of getting team members to specialise and focus is being enacted. As noted:

The goal was to get us to where we need to be really quick [...] strictly speaking [there were] no firm responsibilities. Nobody was ever responsible for anything. I just basically made them play positions. Then we implemented the stand ups every morning like in an agile environment.

Although Ted's role is now clear, the role is one that did not always exist; it is a role which Ted helped create for himself, as he explains:

I started out as a writer. Yeah, as in Ivy (the Lead Copywriter at Canango). And in that timeframe, all the project management was done largely by the creative services manager, that eventually then went to the Marketing Director position because they restructured the organisation [however] I took a shine to the project management tool as it was implemented. It was Basecamp [...] And I really took a liking to this stuff. So I kind of started managing it informally [...] Then Robin said, well, we're going to bring a contractor in to help us manage this workflow. And I said, hey, I really like it. I really understand it. Let me try. Let me try to manage this. And so we did for three months, and I proposed it become a full time position.

This interview excerpt reveals how the desire of Robin, to implement 'up to date' marketing practices such as scrum-style Agile, opened up an opportunity to move from a creative role (still indexed by Ted by the way he decorates his work pod with 'creative' objects) to a new formal

project management role. This change emerged through a process of negotiation about what it might be possible to do at Canango as recounted by Ted. Halliday (2013) identifies the use of ‘verbal processes’ to distinguish between processes which happen in the mind and those which are of a material nature. In the first part of the interview excerpt, Ted ‘materialises’ the telling of how project management had occurred at Canango through a construction which conveys ‘doing’ (Van Leeuwen, 2008) for example, ‘all the project management was done by’. Ted then switches to a semiotic construction which conveys meaning (Van Leeuwen, 2008), taking on a mental character in the first person, present tense, and reinforcing Ted’s point of view. For example, ‘I said, Hey, I really like it. I really understand it. Let me try. Let me try to manage this’. Ted further adds significance to his evocation of meaning, through the repeated use of the adverb ‘really’ and the statement, ‘Let me try’, in quick succession.

What has therefore changed for Ted? What consequences and anticipations have produced meaning? Firstly, Ted has more responsibility than he did before the creation of the project manager role. He is now a supervisor, and this fact also comes with a shift in power dynamics. Ted and the creatives are no longer equals. Ted is also now both a gatekeeper through which program managers must negotiate access to the marketing department, as well as a negotiator, bringing changes in priorities and timelines back to program managers.

8.4.2 Shirley’s perspective

Shirley is a relatively new employee. She did not work under the previous NGO culture. She also has experience in the software industry where her work was performed in a ‘real’ Agile environment. Unlike some of the older members who were initially trained in the print world,

Shirley was trained as a multimedia designer. Her previous work experience has been in the area of UX design and web design. Shirley is more reserved than most of the other creative team members. Where some of the other members wear brighter clothing or dye their hair purple, Shirley usually dresses in solid darker colours. Her work area remains largely undecorated and clutter-free. She generally works while wearing headphones. Here again is a vignette I drew on in Chapter 6 which relates some of her experiences of Agile and what it means to be agile at Canango, in light of the implementation of Agile software and frameworks

Researcher: "So what do you think about Agile?"

Shirley: I feel like it's kind of like a square peg in a round hole here. Like it doesn't quite work I think as Agile is intended to work [...] I triage everything myself. I get the big pile of stuff that needs to be done today, and then I triage it myself into a paper list [...] cuz I HATE Freedcamp. I think it's OK for Ted but it's not great for me."

Researcher: "What is the most frustrating thing about Freedcamp?"

Shirley: "The deadlines don't move. So you'll just have a list of like 20 things that say they're like 300 days overdue [...] so it's just constantly like yelling at you that you suck at prioritising anything. These deadlines are just not real. I can't edit them or anything. So I just go in there every day and then it vomits out everything. And then I have to make my own list to sift through the garbage. Literally. It was sending like HUNDREDS of emails a day and then Ted was like no you're not allowed to turn any notifications off and it's like well I can't get any work done because I'm constantly just getting a torrent of garbage and like a hundred glaring red things and a bunch of passive aggressive messages saying you're

behind and I'd failed at everything."

Here we see how Agile, as implemented at Canango, challenges Shirley's identity as a competent worker, leaving her annoyed, frustrated, and looking for a way to adapt in order to cope. She expresses the significance of the particular implementation of Agile at Canango in three ways: 1. By anthropomorphising the Freedcamp software, "*It's just constantly like yelling at you*"; "*It vomits out everything*" (also noted earlier in Chapter 6); 2. Through the tone and intensity of delivery (Gee, 2014a) "*I HATE Freedcamp*"; and 3. A subtle shift in register, from a composed, slightly more analytical, delivery in the first half of the excerpt to a more informal vernacular as she begins to speak about specific problems that she has with the software. Normally relatively reserved in the work pod, Shirley became animated while discussing her feelings about Freedcamp, which has clearly produced artefacts that serve as an identity resource upon which she draws in order to do her job and make sense of how she fits into the organisation. Her feelings are summed up in the line, "*I think [Freedcamp] is OK for Ted but it's not great for me*".

So what are the consequences of Agile marketing for Shirley? For Shirley the change has been a change from her previous job where Agile was deployed in a web development environment, and everyone understood the process, to one where staff from outside the department don't 'get it'. Shirley did not live in the NGO helper world and to her all these people showing up at her desk are keeping her from her primary goal: getting work done that has been prioritised by Ted and Robin in keeping with Agile practice. To add to her frustration, Freedcamp is 'constantly yelling at her' to the point where she has improvised and adopted an old-fashioned paper list to cope.

8.4.3 Sam the backdoor rebel

Our look at what the shift to the world of Agile marketing means for Sam the operations manager takes us to the lower level of the Canango offices, to a work room next to a door exiting to an alleyway (Figure 5-1). Sam is a 40-year employee of Canango who some observers might describe as a holdover from 1970s rock music culture. He has shoulder-length hair combed back over his head as well as a bushy ‘mutton chop’ moustache. Sam often wears a favourite black leather vest over t-shirts emblazoned with the logos of bands, such as Led Zeppelin, Rush, and AC/DC. Moreover, he has a transistor radio tuned to a classic rock station playing continuously in his work room.

Although his title is operations manager, Sam is a traditional printing press operator (or ‘pressman’ in his words) by training, a trade for which he often expressed nostalgia and pride during interviews and visits. The digitalisation of printing has changed many things about his work, and Sam draws on numerous resources and physical artefacts related to printing, as well as the use of a distinct speech register, to present and instrumentalize his back door rebel identity.

My early professional background was in newspaper and magazine publishing and upon first meeting Sam I told him that the Canango operations department reminded me of the press room of one of the first publishing companies where I worked, and that I would always recognize the smell of printing solvent. Sam immediately took out a bottle of solvent and began to tell stories about how things were before Canango sold its offset printing press and replaced it with digital printing technology, for example:

Every day certain women wouldn't even come in the shop at three o'clock in the afternoon and other people came in just because they loved the smell of the solvents and cleaner. You could get high in there literally. Rip this one (Sam holds the open bottle of solvent toward me for a whiff). This thing will peel paint off of anything. If I poured this on this plastic, it would melt it. Literally. It's a good solvent. That's the last reminder [pauses]. That's the only thing I have left from the old shop.

Significantly, Sam was once a member of the marketing department.

"I started out in the marketing department but somebody decided, well, let's make Sam operations."

Here we are presented with the first major change with which Sam was confronted in his work, and which we shall see helps to frame where he feels he fits into the organisation.

I asked Sam to describe what his work is like in his new role; he had no difficulty describing what his work means to him:

This is a job where you gotta jump. Pump it out when you have to. Like this lady here [in fundraising]. She wants 25 of these kits put together and I just got the order today. But in the computer system when they look at it it says you've got to give Sam 24 hours. But I don't work out IF you need it now. My job is to GIVE it to you right now. Right? Right? You're going out there to get money for us. I can't make you wait 24 hours. And like this one here (picks up a work order from his

table) BNCC (a major donor). They're big. They can't wait. They tell her we need it now. So now it all just rolls downhill and I'm left on the end in case [they] will need to have this big order done by the end of the day. We produce everything that goes into the kits.

I work great under stress and new changes. No big deal. I was forced to learn. I was the last person here to learn how to use a computer. Lisa Smith, our last president and CEO, was the second last person to learn. She told me, 'If I have to learn to use a damn computer, Sonny, you're going to learn. So I've learned. I don't know how to Google. I know how it sends me an order. I know how to pull up the paperwork.

The significance of the change in Sam's work world is brought out in several ways. For example, first Sam refers to himself in the third person when describing the initial change, '*Let's make Sam operations*', emphasising the power differential around decision making and that it was not *his* decision to leave the marketing department. Next, Sam emphasises the conjunction "if" in contrast with the verb 'give' in the construction, '*I don't work out IF you need it right now. My job is to GIVE it to you right now*'. He then repeats the confirmatory use of the word 'right' to ensure understanding on the part of the listener. '*Right? Right?*'. He then uses nostalgia for the days before the current CEO (who has an MBA) by relating a story about how the now retired former CEO insisted that he learn to use a computer because she had to.

The conversation continued:

Researcher: Well, I've noticed that you're one of the people I see all over the building.

Sam: Yeah I'm not sitting at my desk all day long. I don't sit there and play on the computer. There's always something for me to do.

Researcher: So do you think something's lost in going to the digital system?

Sam: There is, it's quality and craftsmanship because I can tell you right now if I took my line gauge and measured from here to that cut mark and from there to that it will not go straight. Right? When I printed something on paper [with ink], it was straight. (Picks up a digitally printed booklet) This could be out a 16th of an inch and I've seen it on a lot of stuff. It's beautiful quality, but it's not accurate quality.

To summarise what the shift to Agile has meant for Sam is a loss of status. A loss of equality. But also a choice to resist. To maintain a sense of the earlier world in his back room where everyone's job is important.

8.5 The Mediators

We have seen how the shift to a world of Agile marketing has meant different things to different people. Next I will explore how some of the artefacts which figure the world of Agile marketing produce meanings for Ted, Shirley, and Sam, serving as mediators to variously position them in

the organisation and offering affordances which in a later section we shall see are used to deploy desired identities and make new worlds.

8.5.1 Agile artefacts – Ted’s tools

Ted explained how project management is structured through the use of various artefacts which serve as tools or mediational means. Examples include software, Agile methodologies, and physical organising systems such as Kanban boards, described earlier (See Exhibit 8-1):

We originally were using Teamwork PM but the designers and writers didn't want to use it because they didn't like all the admin. The perception was that these tools take people away from doing the work...however it forces accountability. Robin explained that tracking and recordkeeping was now part of everyone's job description. It's not taking away from their jobs, it is part of their jobs and makes them more accountable.

After I map out the project tasks in Microsoft Project, they are fanned out via Freedcamp. Then we have a daily scrum or stand up each morning to see where everyone is at, so it really is an Agile methodology like in IT.

For us we still have to plan some things in advance but with our custom accounts, growth accounts and enhanced accounts, we do everything they want us to do, when they want it. We drop everything and move their projects to the front of the queue so for those projects we definitely do agile since they are improvised and revised as we go.

[The] ad-hoc stuff, the non-urgent stuff, things that could be picked up when a creative had a few minutes were hard to manage in the existing software. The simplest solution was a physical kanban board with sticky notes. Occasionally something will become a priority and move into the software world for scheduling and assigning. Also, with the Kanban board creatives can just pick up the stuff they want to do. I don't have to assign it. It cuts out any back and forth about who's going to do what or doesn't want to do something.

The Kanban board is a good example of a semiotic resource which makes use of a number of modes, each with their own affordances and constraints, which enable or limit a practice. The Kanban board thus serves as one of the artefacts that figures the world of Agile marketing at Canango and what it means to be an Agile marketer of a certain type.

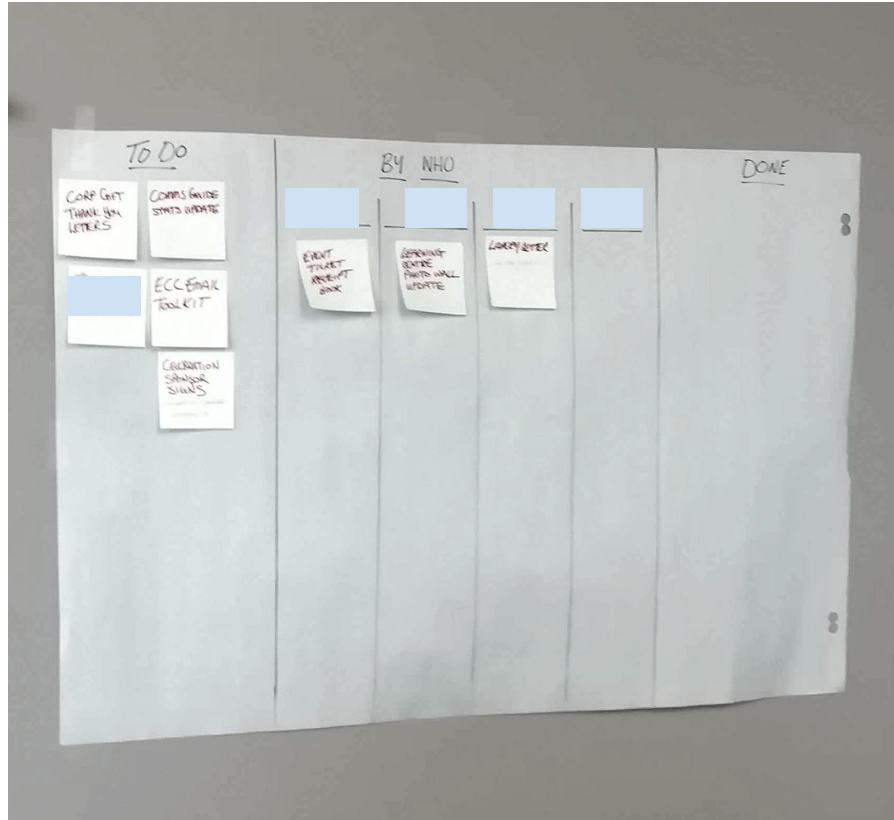


Exhibit 8-1. The Kanban Board at Canango (Names have been hidden for privacy)

The following are some of the semiotic modes at work on Ted's Kanban board:

- *Placement* (it is situated so as to afford the creative team the ability to see it from their pod. See Figure 5-2 in Chapter 5)
- *Alignment* (categories are organised in an ordered series of columns, each with a heading in the same relative position vertically, with headings arranged horizontally from left to right, which signals progress of a task through from selection to assignment, to completion, and a movement forward in time in the Western tradition. Additionally, the individual job 'tickets' have been arranged by Ted in a neat cluster, providing a sense of order and control.)

- *Contrast* (Tasks are handwritten in red ink, contrasting with the other items on the board, affording workers the ability to see the tasks more easily and direct attention, as well as possessing the potential to signal urgency or importance)
- *Repetition* (The tickets themselves are all the same size, shape and colour and feature text of the same colour, in this case *constraining* the ability to visually signal any task hierarchy, for example, using large size or brighter colours to indicate relative importance).
- *Tactility* (Tickets are individual pieces of paper which can be grasped, moved, and stuck to new areas of the Kanban board, secured by ‘restickable’ glue backing. Combined with the non-hierarchical design of the tickets, workers have the freedom to select tasks as they see fit and exercise a certain amount of agency in structuring their work)
- *Writing* (The headings feature the names of some of the creative staff — two designers and one writer, as well as Ted, himself, entextualising them. No other marketing team members are on the board, including other people who are involved in producing content, social media management, proofreading and so forth)

As creative staff select tickets and place them under their names, then move completed tasks to the ‘Done’ column, progress is made visible, helping Ted to perform his role identity and shape his space of authoring as will be discussed further in a later section.

The above interview excerpts include examples of some of the various *Mediators* which emerged alongside the restructuring of the department and the creation of a new role. These mediational means enable Ted to enact a new identity. The various tools and techniques of Agile marketing

offer affordances that help Ted present a certain persona through the speaking of an identifiable social language: that of the *Agile organiser*. Organising processes and scheduling software afford Ted the ability to structure work and order people's time and life energy. The daily stand up meetings hold people accountable, using social pressure and transparency to afford Ted the ability to assert authority and require others to account for themselves. The Kanban board enables Ted to enact his agile identity across time and space; his sticky notes make work tasks, and who is doing them, visible at all times, as well as who is not doing any of the extra tasks.

Researcher: How do you guys normally deal with disruption?

Ted: I think our stand ups are a really critical part of that. Every day is a chance for us to kind of evaluate priorities in the moment and deal with curveballs [...] If someone's expecting a certain product, there may be a conversation that has to be had saying, okay, here's the situation we have. We want to deliver this to you by then [but] it's going to be a week later. The communication is key. And I'd say that's easily 70% of what I would do in my role is communicating.

Each of these Agile marketing mediators will have different meanings for the various team members, depending on their perspective, whether it be Ted whose job it is to schedule work, or the designers, writers and event coordinators who must carry out the tasks while under greater individual scrutiny. In Ted's case, what begins as a directive by Robin for the department to become quicker and more accountable, leads to Ted implementing Agile project management frameworks, which are mediated by the use of Microsoft Project and Freedcamp software, as well as a daily stand-up meeting, producing accountability in Ted's fellow team members. There

are times, however, when this process cannot accommodate ad-hoc special projects. Ted puts up the Kanban board which mediates the production of ad-hoc agile work, demonstrating the adaptable ‘nature’ and organisation skills which partly define the Agile organiser identity. The Kanban board further has the effect of making visible who is busy completing projects and who is apparently *not* working. Other team members must engage with the material on the board and deliberate about work as structured by Ted (see Figure 8-1, below). We will return to the further implications of these affordances for identity work later in this paper.

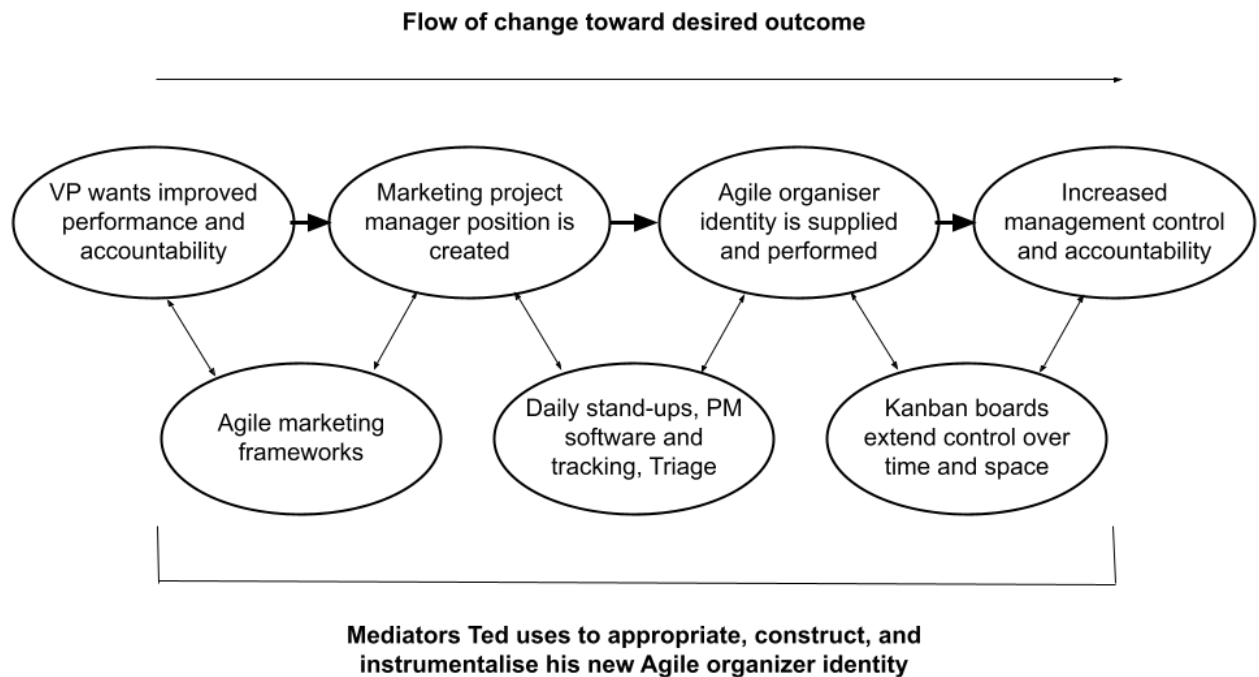


Figure 8-1. The relationship between mediators (mediational means) and events as Ted constructs and ‘uses’ a new Agile organiser identity (adapted from Lorino, 2018)

Thus, we observe that each of these mediators is intimately tied to some sort of action taken toward the achievement of a goal (or goals) and is therefore tied to the construction of identities.

I next turn to the way Shirley uses mediators to deploy her Agile organiser identity..

8.5.2 Shirley invents her own solution

Shirley does not like Freedcamp but it is not the only mediator upon which Shirley draws as an identity resource:

[Also] It would be nice if our internal clients knew our process. If it goes to another department it doesn't really work [because] you can only work when everyone understands the processes.

I think people are used to just like, I'll just go down there and say, can you make me this thing? They don't realise that, we have a list of things that are prioritised and like this thing you need three months from now is not. It's like I feel like we try to plan everything well in advance in our department and then all these things come in at the last minute.

Agile frameworks are claimed to work best when the whole organisation understands and embraces them (E.g. Alexander, 2018). In the above interview fragment, Shirley, who has embraced the idea of Agile processes such as triaging expresses frustration that other people in the organisation don't understand how they "should" operate; that the marketing department is organised and process-oriented (*Mediator*) while people from other departments don't respect the processes followed by the marketing department. Interdepartmental confusion about the Agile

process, combined with what she sees as an inadequate project management software tool (*Mediator*), and Ted's seniority and like of Freedcamp which is 'okay for him' (*Mediator*) and his refusal to allow her to turn Freedcamp notifications off (*Mediator*) leads Shirley to feel that she must take charge in her own way and resort to a 'lo-tech' paper list to be effective (*Mediator*). Software and work processes (*Mediators*), as well as headphones (*Mediator*) and a clutter-free work pod (*Mediator*) combine to serve as mediational means through which Shirley will present her 'Me' (See section 8.7) to the rest of the organisation. Shirley's attire, her use of headphones and a clean desk, along with her shutting out of the electronic world in order to remain focused all show the importance for Shirley of being organised and productive (See Figure 8-2 below). Later, during Covid lockdown, Shirley recounted her experience of working at home:

I like my focus on productivity, better at home because I have less interruptions. I wouldn't say I'm any more creative. Most of my work isn't that creative. I'm pretty focused. I keep my work and personal self, very compartmentalised, so it's 8:30 to 4:45. I just am exclusively a graphic designer and then I go do all my other stuff. I only do work when it's work hours, and I only do personal stuff when it's my personal hours like I don't check email or anything. My husband and I both work from home and we have separate home offices and we kind of both just go do our work during work hours and then. Yeah. Leave it. Shut that computer off and don't look at it until the next day. We're both doing stuff kind of just in our separate rooms with the door shut'.

Like Robin, Shirley sees Agile as being more about *productivity* rather than flexibility. This is

different than Sam and even Ted, who is interested in scheduling and accommodating ad hoc projects and triaging. Also, unlike Ted's use of the Kanban board which is deliberately public and works because it is available for all to use and see, Shirley's hand-written to-do list is a private mediational means. Shirley creates her lists on paper with a pen and keeps it on her person or close by and refers to it as she is working throughout the day. It is not something that is shared with the rest of the work pod, rather it is a list that organises her day in contradistinction to the flurry of emails sent to her automatically by Freedcamp software, or by program staff who still come directly to her desk in an attempt to have her 'drop everything' and work on their immediate project. Like Vygotsky's example of people who tie knots in handkerchiefs as a way to remember things (Holland et al., 1998), Shirley's paper to-do lists are means through which she practices the identity of the Agile organiser, becoming evermore the Agile organiser with the materialisation of every new list and the subsequent striking off of each task.

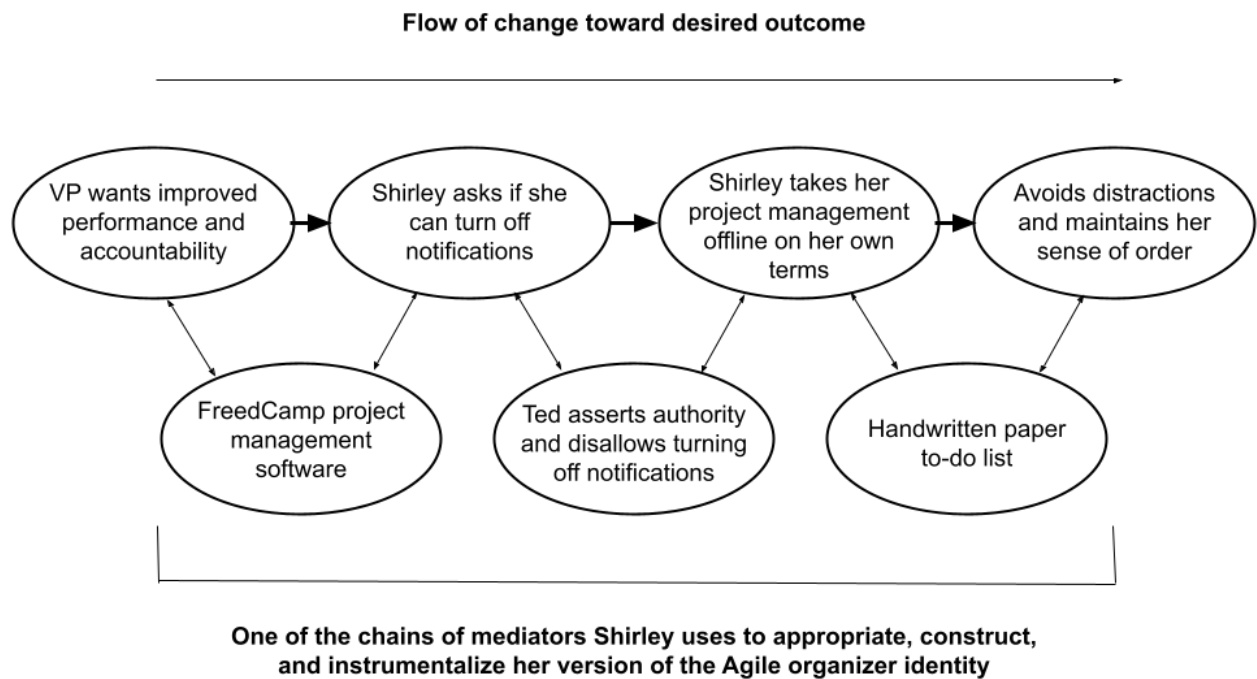


Figure 8-2. The relationship between mediators (mediational means) and events as Shirley ‘uses’ her desired Agile organiser identity to carry her forward from hating Freedcamp to taking her personal project management offline when Ted refuses to let her turn off software notifications (adapted from Lorino, 2018)

8.5.3 Sam takes a different tack

Given his earlier comments about computers and digital printing we see the clear role that computers play in mediating Sam’s identity work. Sam was a hold-out when it came to using computers and ultimately sees working on a computer as ‘playing’ rather than ‘doing’ things. Although he knows how to deploy the mediational means of the computer to do his work, he has not fully appropriated (Bhatkin, in Wertsch, 1994) the computer into his internal sense of identity still seeing computers as problematic in certain ways. According to Sam, something has been lost in the shift to digital printing. The craft and accuracy are gone. He was a better sort of printer in

the old days. Even so, Sam still prints out all of his work orders on paper and lays them out neatly on his work table, shifting their physical order as needed when rush jobs come in. He resemiotizes the orders that come in from both the marketing department, as well as directly from program staff, using a traditional physical docket system, rather than organising his work in the software through which the orders are placed. For Sam, the work request becomes real when it is printed and arranged on his work table.

So who is Sam, now?

“I’m the guy that does everything and anything for anybody...[for] ALL the different departments [...] I just take over and do what I gotta do. If you need it, I supply it. I try not to make people wait. Everybody’s job is important.”

“I just had one from the housing program. Sam, we need 200 of these. So instead of going through marketing, like you’re supposed to, they just sent the PDF to me and okay, we’ll open her up, set up my computer, send it to the copier, bing bang done. They had it in less than half an hour. Right? But if that went through the marketing department, they say no, we need these, these, these, these first, but she sent it to me when the marketing department was on their lunch break.

Here Sam ventriloquizes the voices of the *helper*, the *press operator*, the *everyman* and ultimately the *rebel*. Earlier we heard Sam speak a little of the language of recreational drugs (e.g. *Here, rip this one! You could get high, literally. I take a little sniff once in awhile...kind of a reminder of the old days...burn a few more brain cells hahaha.*); as well as the language of the

printing trade (e.g. *I could take my line gauge...cranking out copies...negatives...solvents...ink gets in your blood...Every day I'd go home and my hands were black or blue or red, the three main colours I use and every day my wife would say to me did you wash your hands before you came home? Yes dear. Well how come you're still full of ink? Because it's IN MY SKIN!*)

Sam is now the guy who uses computers as a mediational means (Figure 8-3) to enact a different kind of agility from the sort upstairs in the marketing department (*'Me'*). Because “everybody’s job is important” (not just those in the marketing department), if you want something done quickly, he will do it for you while the marketing department isn’t looking. In contrast to Ted, who talks about scrum and kanban and Freedcamp as tools, Sam talks about computers in reference to how *little* he uses them, contrasting his experience and common sense with the new project management rules everyone is supposed to follow. Digitalization ultimately allows Sam to circumvent the official Agile marketing processes, themselves inspired by digitalization, and decide for himself when to serve an internal customer. He is thus afforded the ability to instrumentalize a “back door rebel” identity, in keeping with his solvents, his moustache, and his rock music.

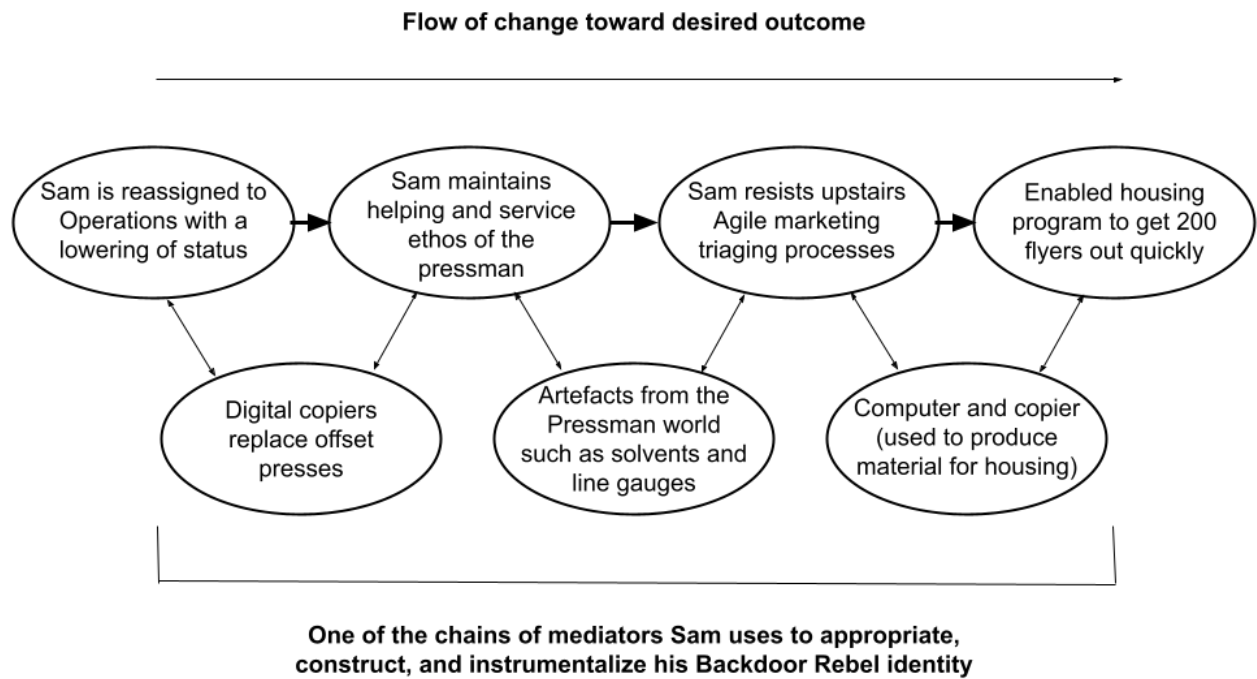


Figure 8-3. The relationship between mediators (mediational means) and events as Sam ‘uses’ his ‘backdoor rebel’ identity, using artefacts from his ‘pressman’ world to use computers as a resource to resist the Agile marketing world supplied by Robin and Ted (adapted from Lorino, 2018)

8.6 Ted’s position and space of authoring – constructing his new ‘Me’

In Chapter 2 I introduced two important concepts within Figured Worlds theory: positioning and space of authoring. People are positioned within figured worlds by power balances, habits, and various other rules which define a figured world and establish what is thought of as normal by the inhabitants of that world (Gee, 2014a; Holland et al, 1998). Van Leeuwen (2005; 2008) might describe these various rules as legitimation conditions or normative regimes. It is the way that people are positioned within a particular figured world that gives them social space in which to express, develop or enact their identity with respect to that figured world and possibly change

both it and the figured world. As the marketing project manager, Ted has considerable licence to operate within and make the figured world of Agile marketing at Canango and enact an Agile organiser identity within it while also drawing on other figured worlds of which he is a part (Figure 8-4).

Communicating through meetings, through standing up with project management charts in hand, by populating the Kanban board with sticky notes naming the project tasks to be taken up by the creatives, negotiating new delivery dates with program leaders; all of these actions comprise the vocabulary of the Agile organiser, and of Ted, and illustrate how Ted constructs a new “Me”. This identity, in turn, helps Ted to guide the creative team (the *motion* element in the 5-M framework, discussed below) and achieve managerial goals, for example:

“We are probably 65% known planned cyclical work and now 35% Custom. [...] When I started here, we were probably closer to 90%, scheduled, cyclical work and 10% unexpected and that's been shifting massively. And not only has that been shifting in the ratio, but the number of projects that we deliver [...] is growing. I've seen that in some of the data I've had in the various tools I've built over the years.”

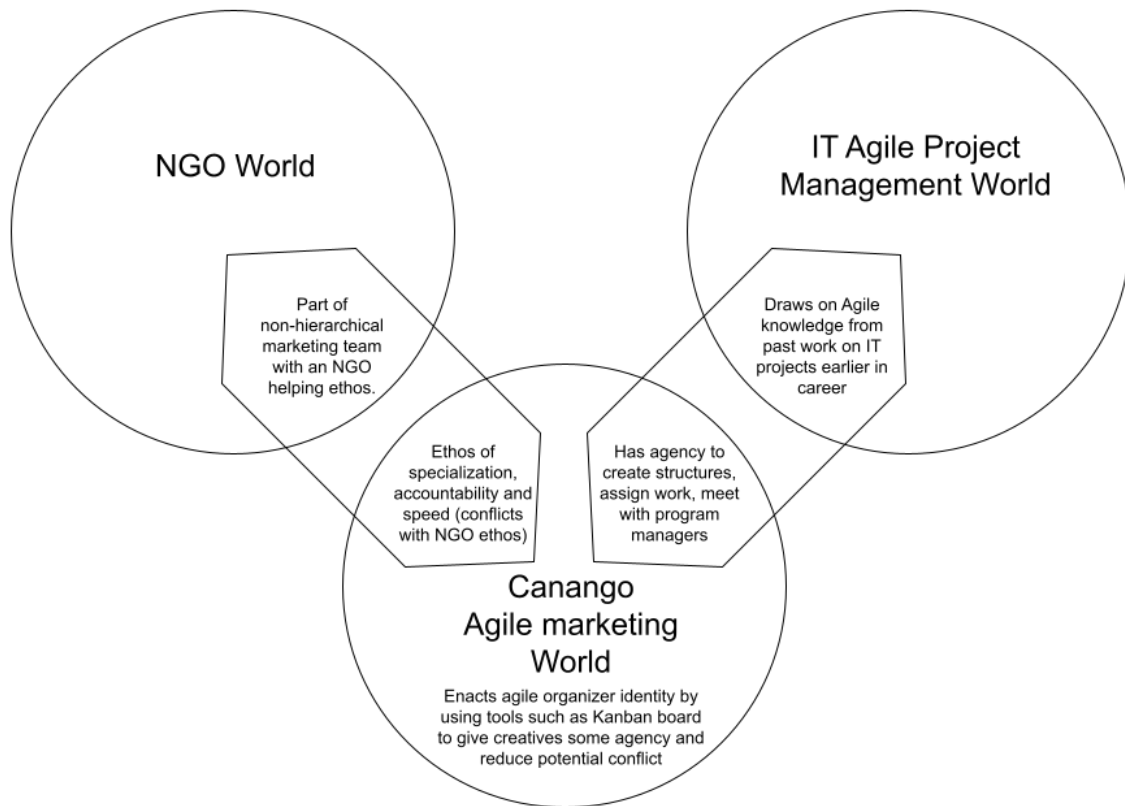


Figure 8-4. Ted's spaces of authoring, shown as the intersection of the bars linking each of the figured worlds in which Ted is a participant, and which variously enable or constrain the construction of his Agile organiser identity (adapted from Valdez & Omerbašić, 2015)

Robin puts Ted's position into perspective:

Essentially streamlining that stuff falls into sort of a bit of a mix with Ted's position as the project manager. He sort of goes all over the place [...] It's important to have someone sort of with an understanding of where everything is at any given time and keep people accountable. One of the team members left; they didn't like that style. There's been a lot of change on the team, the past year, there's another writer who could not appreciate the amount of work or quality

that we needed. So we had to let them go. We did 30% more events this year. Right? We've done something like 25 more individual pieces of creative [so far] this year for programs that need specialised stuff. So the need for the work that they're doing is growing quickly. So we need to optimise each position. So we can't, I don't really appreciate sports analogies, but we can't have everybody playing every position all the same time.

One of the ways that Ted works to optimise Agile processes is through the Kanban board discussed earlier in this chapter; however, the Kanban board goes beyond mere optimization and offers a specific space of authoring to him, and to a limited extent, all of the creatives. Returning to Table 8-3 (the social practice analysis of the production and use of the Kanban board) illustrates how various eligibility conditions (Van Leeuwen, 2008) as well as key processes of entextualization (Jones, 2021) both variously afford and constrain Ted, Shirley and Sam. This table, based on Van Leeuwen's (2005; 2008) approach to analysing social practices and how they are enabled and constrained, traces the actions associated with 'doing Kanban' that are undertaken by Ted, Shirley, Lawrence, and the writer, Ivy, but importantly, *not* Sam. The first five activities, *designing the Kanban board, putting names on the board, putting up the Kanban board, identifying tasks to be done, and posting tasks*, are all undertaken by Ted due to the eligibility conditions associated with these tasks at Canango, in this case having the project manager role. In other organisations different role types may be involved in posting projects or have involvement in customising the board. Regardless, every organisation will have its own eligibility conditions; however, it is unlikely the janitor will have any part in designing Agile marketing Kanban boards. Notice as well that the eligibility conditions are closely tied to the

affordances and constraints of the way eligibility is materialised. Ted is eligible to design the board because that is one of the things that project managers do. Post-it notes are used because they are of a convenient size and are re-stickable and therefore meet the criteria that the tickets be easily repositioned multiple times.

The relevance of affordances carry forward in later activities undertaken by the creatives. For example, one must be a creative with the requisite design or writing skills to be named on the Kanban board in the first place and one must have a licence to the necessary design software such as Adobe Creative Suite. Once these eligibility conditions are met, it is possible that one might be added to the board, the topic of the next subsection.

8.6.1 Entextualization – another way that Ted materialises his (and other’s) identity

One of the most interesting outcomes of conducting the above social practice analysis of the deployment of the Kanban board is noting the role that entextualization plays in constructing and producing Agile organisers. Entextualization, as the reader will recall, may be seen as ‘the process through which actions are turned into semiotic mediational means for taking subsequent actions’ (Jones, 2009, p. 287); however, it also has a more classical definition in linguistics as ‘the process whereby language becomes detachable from its original context of production and is thus reified as “text”, a portable linguistic object’ (Bauman and Briggs, 1990 in Jones, 2021, Ch. 1, p. 10). Moreover in Western culture the ability to entextualise others, in an official sense, has also been the purview of those with authority, (e.g. people working in law, government, teachers, social workers, registered psychologists, the police) enabling the construction of boundaries

(Jones, 2021) and in effect defining spaces of authoring held by others. As Jones writes, ‘[t]o create texts is to define reality’ (Jones, 2021, Ch. 1, p. 10).

According to Jones (2021) there are five processes of entextualisation: ‘1. *framing*, in which borders are drawn around the phenomenon in question; 2. *selecting*, in which particular features of the phenomenon are selected to represent the phenomenon; 3. *summarizing*, in which we determine the level of detail with which to represent these features; 4. *resemiotizing*, in which we translate the phenomenon from one set of semiotic materialities into another; and 5. *positioning*, in which we claim and impute social identities based on how we have performed the first four processes’ (Ch. 1, p. 10). Importantly, these five processes are mediated by what Jones calls ‘technologies of entextualization’ (2021, Ch. 1, p. 10) for example Kanban boards, with their own affordances and constraints (see discussion of the various modes at work on Canango’s Kanban board discussed above). Considering Jones’ five processes of entextualization, then, here is how the entextualization of both work and workers operates on Canango’s Kanban board:

1. Framing: The Kanban board, with its job tickets and headings naming people, circumscribes what is to be done and by whom. Only the people named on the board are able to do only those jobs written on tickets and placed under the ‘To-do’ column heading
2. Selecting: only specific jobs to be done on an ad-hoc basis in no particular order are selected and not formally scheduled ongoing projects
3. Summarising: Jobs and people on the board are represented simply in text form. There are no images or instructions for how to complete tasks.

4. Resemiotizing: Ted resemiotizes e-mail project requests, meeting notes, and verbal discussions about jobs to be done into handwritten text on post-it notes
5. Positioning: The Kanban board positions people by defining who does certain kinds of work through the processes of framing, selecting, summarising and resemiotizing. Only people whose names are on the Kanban board do the work on the job tickets (Lawrence, Ivy, Shirley, and Ted and not Siobhan, Finn, or Miriam) which are only placed in position by Ted due to his role as project manager.

These processes mirror, to some extent, the observations brought out by a social semiotic, social practice analysis of ‘doing Kanban’ discussed above (See Table 8-3 at end of chapter). In both cases, they illustrate how figured worlds are constructed through processes of entextualization and the production and deployment of new artefacts in an environment, in turn defining and adding to the stock of ways in which various identities, such as the Agile organiser, are materialised and figured through practice.

The above examples, of course, deal with one person, Ted, creating and supplying an available identity to other people in his department (Ivy, Shirley, and Lawrence) through a social semiotic process of figuring worlds; however, similar processes can also be put to work by individuals themselves. To understand the dynamics of marketing agility and how agile marketing tools mediate the identity work undertaken by a front line member of the creative team, we next turn to an analysis of how Shirley uses some of the same mediational means that Ted uses to instrumentalize an agile organiser identity, but in her own unique ways. As we are reminded by Jones (2014) mediational means follow itineraries as they are incorporated into the historical

trajectories of the people who use them, leading to their resemiotization (Iedema, 2003) and the production of new mediational means and meanings (Jones 2014).

8.7 Shirley’s position and space of authoring – constructing her new ‘me’

Software and work processes, as well as headphones and a clutter-free work pod combine to serve as mediational means through which Shirley will present her “Me” to the rest of the organisation, for example:

Researcher: I find it really interesting that you're trained as a new media designer and you work in the digital domain a lot, but you keep your life organised on paper

Shirley: Yeah, I try. There's so much information coming in from everywhere and notifications [...] like I don't have most notifications turned on on anything because it's just too much information at all times. And if it's on paper, it's just information I need right now. But if I put it in my phone or whatever, then I'm like, away, go away (waves hands).

As noted earlier Shirley, who has experience working in UX design in a more typical Agile web development environment, feels that Agile isn't done quite right at Canango. Her approach to instrumentalizing her own expression of the agile organiser identity is to operate outside of the official software-based process, through the use of paper lists over which she has control. She resemiotizes the framework by recategorizing Freedcamp software then sidestepping it to bring the process into a different form: paper lists (Figure 8-5).

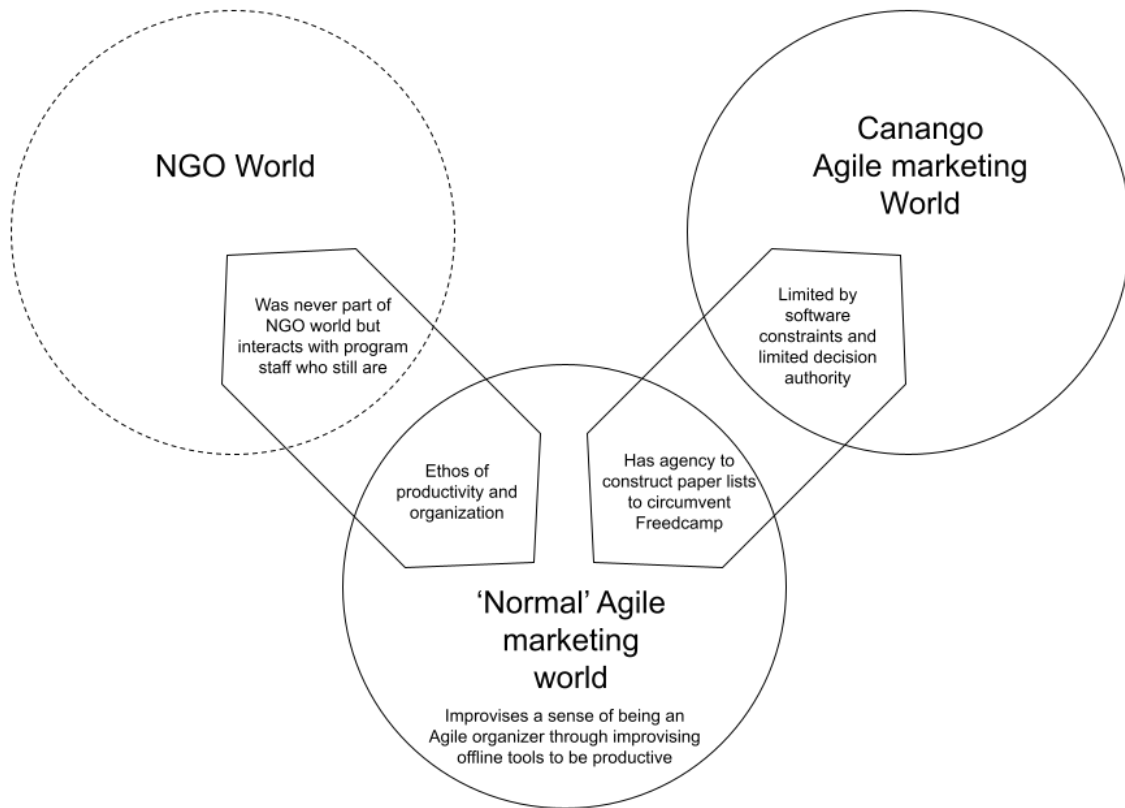


Figure 8-5. Shirley’s spaces of authoring shown as the intersection of the bars linking each of the figured worlds in which she is a participant, and which variously enable or constrain the construction of her Agile organiser identity (adapted from Valdez & Omerbašić, 2015)

Shirley's construction and use of her paper lists are predicated on several assumptions about what constitute ‘normal’ ways of being an Agile organiser at Canango:

1. Projects should be prioritised according to a plan
2. Prioritisation should be done by the marketing department and not the program departments

3. High value is placed on output and efficiency
4. Workers are competent but Freedcamp is not, instead it is a time drain

8.8 Sam's position and space of authoring – resisting a new 'me'

For Sam, his move out of the marketing department after the offset printing presses were sold and into a new operations role both closed off and created new potential spaces of authoring. Looking at Figure 8-6, we see that when Sam was part of the marketing team during the past NGO helper era he, like the other members of the team, operated in a less hierarchical environment and he had more voice to make suggestions about particular production details, particularly as related to the print production implications of certain designs such as paper stock, folding, cutting and so forth. This space of authoring was also linked to his place in the world of the 'pressman' [sic] in which he saw himself as having a craft and as part of a long tradition of skilled blue collar work, further infused with an ethos of service. With the institution of Agile marketing, however, his role as a 'marketer' is diminished and limited to making copies on a highly automated modern digital colour copier, assembling information kits for fundraising and marketing, maintaining inventories of supplies, and so forth. The link between his past as a press operator and his now more subordinate relationship with the marketing department is illustrated by the dashed lines in Figure 8-6. Ultimately, however, Sam still chooses to use artefacts from the Agile marketing world, such as computers and references to Ted's system of triage, along with preserved artefacts from the figured world of the pressman to motivate back door action on behalf of program departments who will bring him designs of their own to print right away, without following Agile protocols.

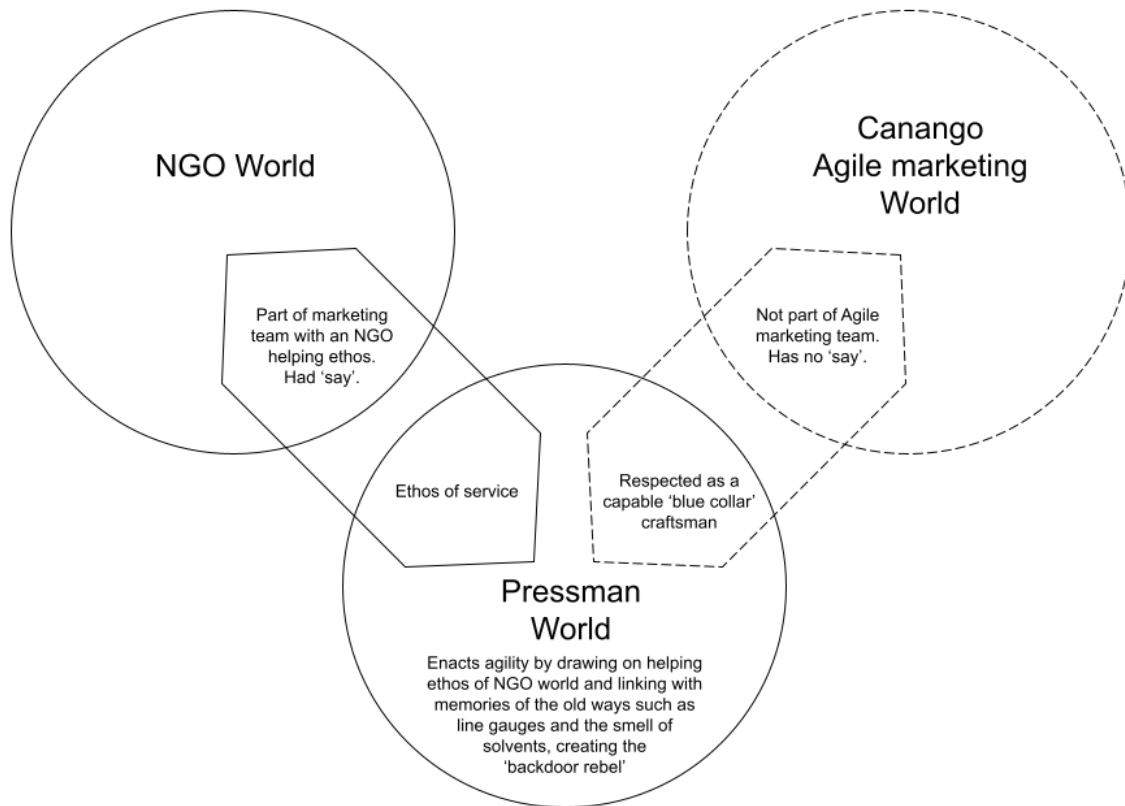


Figure 8-6. Sam’s spaces of authoring shown as the intersection of the bars linking each of the figured worlds in which he is a participant, and which variously enable or constrain the construction of his backdoor rebel identity (adapted from Valdez & Omerbašić, 2015)

8.9 Motion – Ted, Shirley, and Sam make a new world

As we saw in chapter 2, identity may be imagined in relation to figured worlds within the context of making new worlds. People ‘try on’ different identities, imagine certain characters, and who they might be in a given figured world, improvising the use of various artefacts and imagining something other than the current world (Holland et al., 1998). Over time, as new ways of doing and being take on shared meanings and the beginnings of habit, new identities may begin to stabilise (Holland et al, 1998). In the case of Canango I was only able to be on site long enough

to see certain figured identities in relatively developed form; however, of the three Canango personnel discussed here, Ted and Sam most exemplified reinventions while Shirley exemplified improvisation.

Ted moved from a creative position within the context of the earlier NGO helper world to a project manager role in a world which he had a large part in shaping. As he enacted his identity as an Agile organiser, improvisationally deploying different artefacts in an effort to be successful such as Basecamp, then Freedcamp and eventually the Kanban board, he worked with Robin and the creative team to create a shared understanding of what they hoped to accomplish and establish practices in which Shirley and the other creatives (but not Sam or the program staff) played an active role in shaping, ultimately accomplishing his goal of establishing a more effective and productive marketing department (See Table 8-4 below).

For Shirley, who arrived with a pre-conception of Agile from prior work experience, she improvised her use of the to-do lists to nevertheless achieve the level of output desired by Robin and Ted.

Sam, of course, ‘does his own thing’, using artefacts from the world of the pressman and the NGO helper worlds to motivate his backdoor use of resources from the Agile marketing world. Artefacts such as computerization and order scheduling software are used in contrary ways, to meet the immediate needs of program departments and get work done in line with their priorities, rather than those of the marketing department.

Ultimately, though, the different approaches taken by each individual to deploy their identities to achieve their goals were not coordinated and, arguably, even working at slight cross purposes. The sum total of their activities is what Agile marketing *is* at Canango; however, in Holland et al.'s (1998) terms this would not constitute a settled world but rather a world that is still being contested; still in a stage of 'play'. Eventually the meaning of the world of the Agile marketer may come to be more broadly defined and include such activities as using paper lists or see it as normal for individual team members to work on projects independently outside the norms of how projects are prioritised, organised and communicated in a 'normal' Agile marketing environment. For now, the one shared assumption is that work must be done in ways that are flexible and responsive, and this may indeed be the most important understanding in order for Agile to 'work' in an organisation as it is prioritised in the original Agile manifesto (Appendix 1); however, the meaning of these concepts is not agreed and so people are still drawing on resources from different worlds as well as the same world, differently. Thus, the making worlds concept seen as improvisation and play can help us understand such processes as how 'the symbolization of identities can come about and be used to direct the behavior of others and oneself' (Holland et al, 1998, p. 278). In other words, agency is a process that is unsettled, rather than the neat rational chain of causality promulgated by mainstream functionalist marketing management textbooks.

In the examples contained in Table 8-4, the Agile organiser and backdoor rebel identities are defined in their own way by Ted, Shirley and Sam, who each produce new artefacts, expanding the scope and strength of what it means to be make the world of Agile marketing and be an Agile marketer at Canango.

8.10 Conclusion

In this chapter my aim has been to bring attention to how various constructions of agile marketing identities such as the Agile organiser and backdoor rebel are used for the accomplishment of situated work goals. Uniquely, for a study of marketer identities, I have focused my analysis on the mediational means through which marketers perform this instrumentalizing process within figured worlds. This approach extends what we may know about marketing agility by expanding the frames of reference beyond the usual positivist strategic management, dynamic capabilities, and organisational design perspectives to include identities in figured worlds. I contribute to the emerging body of research on marketing agility by ensuring identity processes and the role identity constructions play in practice is not lost in a larger literature that will likely be underpinned by the assumption that ‘agility’ is necessarily and always a good thing and that it can inevitably be achieved through the correct application of systematic processes designed to optimise performance. My work shows that marketing agility and especially agile marketer identities are complex constructions that can be mediated by any situationally useful resource suited to the habits and goals of individual marketers and their interactions with people, practices, available social identities, and cultural tools. Moreover, I evidence, as first articulated by Iedema (2003), how through processes of resemiotization, the same instrumental means can be used by different people in different ways to achieve their own goals. Such processes produce new mediational means, and through them the marketers use their unique agile marketer identities in the process. This is not to say that different marketers are necessarily working at cross purposes. In fact, my case illustrates how different people within the same organisation may ultimately have the same overarching goal, (E.g. to effectively communicate its mission and successfully raise funds for important community programs), while

holding very different interpretations of how those goals should be achieved. As we have seen, this has consequences for how marketers present themselves to other members of the organisation.

On the one hand Canango has a professionalised leadership, tasked with “bringing the marketing department up to date” and attempting to do so through the introduction of a new social language; that of the agile organiser, borrowing semiotic resources from the IT sector and adapting them to marketing. By restructuring work in the marketing department the Vice President of Marketing produced change that has created opportunities and challenges for other people in the organisation. In one instance, a marketing creative grasped an opportunity to embrace a new agile organiser identity and play a part in making a new figured world of Agile marketing at Canango. At the same time, artefacts within this new figured world afforded the newly constructed marketing project manager to present his agile marketer identity to other team members and across the larger organisation. Meanwhile, another member of the marketing team with a different experience of Agile marketing from a previous workplace, finds that she has to change her individual practice in her immediate context, developing processes that escape the official resources (in this case Freedcamp project management software application and, indirectly her supervisor, Ted) and inventing a private way of working at a micro level. This resemiotization gives her some control over processes and sustains her desire to be agile and organised, despite her sense that Agile processes are a bit like “a square peg in a round hole” at Canango, because other parts of the organisation have not fully embraced the change. This resistance is exemplified by Sam the Operations Manager who takes a completely different approach to agility by adopting unofficial practices as he sees fit, to accomplish what needs to be

done in the moment “because everyone’s job is important”. In fact, one could argue that, in a sense, Sam’s approach to agility more closely resembles the ‘spirit’ of the original Agile manifesto (Appendix 1). It was only later that the principles articulated in the agile Manifesto were adapted to structured frameworks such as Scrum. To this day the drafters of the Agile Manifesto claim that Agile is not a method or framework but rather an ethos; it is up to local practitioners to design processes that adhere to the principles but that work for their specific setting (Denning, 2018).

The imposition of “pre-packaged” methods from the outside or from above always opens up the possibility that they will be misapplied, misinterpreted, or simply not work according to plan. Earlier I highlighted the ways in which Agile project management tools and processes serve as mediational means which afford Ted the ability to instrumentalize his agile organiser identity by structuring work, holding people accountable, and projecting his identity across time and space. Doing so enables Ted to, in effect, *use* the “identities” of the people with whom he works; however, although these mediational means serve as sites of power through which Ted and ultimately the VP of Marketing may assert their authority, there is no inherent reason why they may not also serve as sites where power might be shared. Kaufmann asks, ‘What does it mean to use a person?’ (2011, p. 57). He concludes, along with Kant, that it is wrong to use people only as means to an end because doing so violates their human dignity. He argues that the moral position on instrumentalizing people is to do so only with their consent. The question arises, therefore, of how does one obtain consent? The promises of Agile project management frameworks appeal to workers’ sense of fairness; presenting an ethos of worker control over their work; of shared responsibility and non-hierarchical decision making. However, as others have

argued, the tools and techniques of Agile marketing theoretically work “best” when everyone understands and goes along with the practices (Cuddleford-Jones, 2019). Moreover, because of Agile’s ethos of open communication, there is social pressure to go along with the processes or risk exposure as one who doesn’t follow the rules or ‘play nicely with others’. Sometimes an unwillingness to always follow the rules may be embraced, as in the case of Sam, the backdoor rebel, but as has been described and documented countless times subjectification lies at the heart of the entire management project (e.g., du Gay, 1996; Maguire and Hardy 2009 in Fleming and Spicer, 2014). Instrumentalizing people is essentially what managing people is all about. It thus begs the question whether marketing agility and agile identities are really, at their heart, just the latest way to control marketers while letting them think that they are in control themselves?

Table 8-1. 5-M Analysis of Ted, Shirley, and Sam as they navigate the shift to Agile marketing

| Marketer | Matter | Meaning | Mediator | Me | Motion |
|----------------------------------|---|---|---|---|---|
| Marketing Project Manager | <p>New VP arrives and wants to implement an IT-style Agile approach to marketing project management</p> <p><i>“I just basically made them play positions. Then we implemented the stand ups every morning like in an agile environment.”</i> VP of Marketing</p> | <p>The desire of the new VP of Marketing to implement “up to date” marketing practices such as scrum-style Agile opens up an opportunity to move from a writer role to a new formal project management role</p> <p><i>I started out as a writer. Yeah, as in Ivy (the Lead Copywriter at Canango). And in that timeframe, all the project management was done largely by the Creative Services Manager, that eventually then went to the Marketing Director position because they restructured the organisation [however] I took a shine to the project management tool as it was implemented. It was Basecamp [...] And I really took a liking to</i></p> | <p>Structured Agile framework borrowed from IT approaches using software such as Freedcamp and physical tools such as Kanban boards.</p> <p><i>“After I map out the project tasks in Microsoft Project, they are fanned out via Freedcamp. Then we have a daily scrum or stand up each morning to see where everyone is at, so it really is an Agile methodology like in IT. “</i></p> <p>The tools afford the marketing project manager to enact his agile marketer identity through organising his identity through software and physical meetings.</p> <p><i>“[The] ad-hoc stuff, the non-urgent stuff, things that could be picked up</i></p> | <p>The new processes and technology have helped the Marketing Project Manager redefine himself as an Agile organiser who is responsible for communicating what needs to get done compared to his previous role as one of the writers.</p> <p><i>Researcher: How do you guys normally deal with disruption?</i></p> <p><i>Marketing Project Manager: “I think our stand ups are a really critical part of that. Every day is a chance for us to kind of evaluate priorities in the moment and deal with curveballs [...] If someone's expecting a certain product, there may be a conversation that has to be had saying, okay, here's the situation we have. We want to deliver this to you by then [but] it's going to be a week later. The communication is key.</i></p> | <p>The Marketing Projects Manager leads stand-ups, assigns and schedules work and monitors progress through the deployment of Agile frameworks to increase productivity:</p> <p><i>“We are probably 65% known planned cyclical work and now 35% Custom. [...] When I started here, we were probably closer to 90%, scheduled, cyclical work and 10% unexpected and that's been shifting massively. And not only has that been shifting in the ratio, but the number of projects that we deliver [...] is growing. I've seen that in some of the data I've had in the various tools I've built over the years.”</i></p> |

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| | | <p><i>this stuff. So I kind of started managing it informally [...] Then the VP said, well, we're going to bring a contractor in to help us manage this workflow. And I said, hey, I really like it. I really understand it. Let me try. Let me try to manage this. And so we did for three months, and I proposed it become a full time position.</i></p> | <p><i>when a creative had a few minutes were hard to manage in the existing software. The simplest solution was a physical Kanban board with sticky notes."</i></p> <p>The Kanban board extends the marketing project manager's identity as agile organiser in time and space. Other workers interact with it publicly and as their schedule opens up to work on backlogs. The marketing project manager does not have to be physically present in order for the organising framework to have effects and avoiding potential 'nattering and bickering' according to Robin.</p> | <p><i>And I'd say that's easily 70% of what I would do in my role is communicating."</i></p> <p>The communication activities ensure that the marketing project manager is seen and heard by many people in the organisation on a continual basis which ensures that he has presence within the organisation and others are aware of his role and position as a work gatekeeper; a position of relative power. He has the authority to initiate and suspend work.</p> | |
| Designer | Introduction of Freedcamp software and Agile Project Management framework | <p>The designer has experience with Agile frameworks from prior employment. Agile at Canango isn't quite the same, leading to identity work</p> <p><i>Researcher: "So what</i></p> | <p>The designer makes sense of her identity and place in the organisation through two mediators: the problematic project management software and the use of a low-tech paper list</p> | <p>Other departments don't follow the processes, but the work still has to get done. The predicament requires innovation.</p> <p><i>Researcher: "I find it really interesting that you're trained as a new</i></p> | <p>The designer is able to triage her projects herself, enabling her to get work done, despite the problems with the project management software and the lack of knowledge about Agile on the part of other departments</p> |

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| | | <p><i>do you think of this notion of being agile? I'm not talking about Agile Project Management necessarily but just as you said, You have so many different things on the go.</i></p> <p><i>Graphic Designer: I feel like it's kind of like a square peg in a round hole here. Like it doesn't quite work I think as Agile is intended to work.</i></p> <p><i>Researcher: And why is that?</i></p> <p><i>Designer: "Cuz I hate Freedcamp."</i></p> <p><i>Researcher: "What is the most frustrating thing about Freedcamp?"</i></p> <p><i>Designer: "The deadlines don't move. So you'll just have a list of like 20 things that say they're like 300 days overdue [...] so it's just constantly like yelling at you that you suck at prioritising anything. These deadlines are just not real. I can't, I can't edit them or anything. So I just go in</i></p> | <p><i>Researcher: "Interesting."</i></p> <p><i>Designer: "I think [Freedcamp] is OK for Ted (the Marketing Project Manager) but it's not great for me.</i></p> <p><i>[Also] It would be nice if our internal clients knew our process. If it goes to another department it doesn't really work [because] you can only work when everyone understands the processes.</i></p> <p><i>I think people are used to just like, I'll just go down there and say, can you make me this thing? They don't realise that, we have a list of things that are prioritised and like this thing you need three months from now is not. It's like I feel like we try to plan everything well in advance in our department and then all these things come in at the last minute.</i></p> <p><i>"I triage everything myself, like I get a big pile of stuff that needs to be done today, and then I triage it myself into a paper list.</i></p> <p>The lo-tech paper list allows the designer to</p> | <p><i>media designer and you work in the digital domain a lot, but you keep your life organised on paper?"</i></p> <p><i>Designer: Yeah, I try. There's so much information coming in from everywhere and notifications [...] like I don't have most notifications turned on on anything because it's just too much information at all times. And if it's on paper, it's just information I need right now. But if I put it in my phone or whatever, then I'm like, away, go away.</i></p> <p>The designer remains productive through escape</p> | |
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| | | <i>there every day and then it vomits out everything. And then I have to make my own list to sift through the garbage.”</i> | escape the constraints of the software and Ted’s scheduling, as well as assert authority over her schedule and avoid disruptive requests from other Canango departments. | | |
| Operations Manager | <p>New rules and processes about how marketing work is to be done, disrupts Sam’s place in the organisation</p> <p><i>“I started out in the marketing department, but somebody decided, well let’s make Sam operations.”</i></p> | <p>Sam the operations manager makes sense of his place at Canango by talking about organisational purpose and drawing on nostalgia to reinforce his view that his approach is valid</p> <p><i>This is a job where you gotta jump. Pump it out when you have to. Like this lady here. She wants 25 of these kits put together and I just got the order today. But in the computer system when they look at it it says you’ve got to give Sam 24 hours. But I don’t work out IF you need it now. My job is to GIVE it to you right now. Right? Right? You’re going out there to get money for us. I can’t make you wait 24 hours and like this one here at BNCC (picks up a work order from his table). They’re big. They can’t wait. They tell her we need it now.</i></p> | <p>Computers serve as a powerful mediational means by which Sam constructs his identity</p> <p><i>Researcher: “Well I’ve noticed that you’re one of the people I see all over the building”</i></p> <p><i>Sam: “Yeah I’m not sitting at my desk all day long. I don’t sit there and play on the computer. There’s always something for me to do.”</i></p> <p><i>Researcher” “So do you think something’s lost in going to the digital system?”</i></p> <p><i>Operations Manager: “There is, it’s quality and craftsmanship because I can tell you right now if I took my line gauge and measured from here to that, that cut mark and from there to that it will not go straight. Right? When I printed something on paper [with ink], it was straight. (Picks up a</i></p> | <p>Sam’s “me” affords him the ability to use his practical judgement</p> <p><i>“I’m the guy that does everything and anything for anybody...[for] ALL the different departments. So I just take over and do what I gotta do. If you need it, I supply it. I try not to make people wait. Everybody’s job is important.”</i></p> <p><i>“I just had one from the housing program. Sam, we need 200 of these. So instead of going through marketing, like you’re supposed to, they just sent the PDF to me and okay, we’ll open her up, set up my computer, send it to the copier bing bang done. They had it less than a half an hour. Right? But if that went through the marketing department, they say no, we need these, these, these, these first, but she sent it to me when the</i></p> | <p>The Operations Manager frequently talks about computers and his minimal use of them to contrast his long experience with traditional offset printing and how something has been lost in the shift to digital printing. Yet, digitalization also allows him to circumvent the official Agile processes and decide for himself when to serve an internal customer while the marketing department isn’t looking. He is thus afforded the ability to enact a “back door rebel” identity, in keeping with his solvents, bushy sideburns, leather vest and rock and roll t-shirts.</p> |

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| | | <p><i>So now it all just rolls downhill, and I'm left on the end in case the company will need to have this big order done by the end of the day. We produce everything that goes into the kits.</i></p> <p><i>"I work great under stress and new changes. No big deal. I was forced to learn. I was the last person here to learn how to use a computer. Lisa Smith, our last president and CEO, was the second last person to learn. She told me, 'If I have to learn to use a damn computer; Sonny, you're going to learn. So I've learned. I don't know how to Google. I know how it sends me an order. I know how to pull up the paperwork.</i></p> | <p><i>digitally printed booklet) This could be out a 16th of an inch and I've seen it on a lot of stuff. It's beautiful quality, but it's not accurate quality."</i></p> | <p><i>marketing department was on their lunch break.</i></p> | |
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Table 8-2. Transformation of marketing at Canango: From NGO world to Agile marketing

| Components of Practice | NGO World | Agile Marketing World |
|------------------------|--|---|
| Actors | <ul style="list-style-type: none"> • Two copywriters • Three designers • One printing technician • Two event planners • Marketing director | <ul style="list-style-type: none"> • One copywriter • Two designers • Three event planners • Marketing project manager • Digital content coordinator • Director of communications • Vice president of marketing |
| Activities | <ul style="list-style-type: none"> • Canango departments determine their communications needs • They bring them to the director of communications or an individual designer or writer • The team works on projects in the order they are received • Everyone has a hand in creative direction on all projects, including program staff who brought work to the department. | <ul style="list-style-type: none"> • Senior marketing managers develop marketing communications plan with senior executive team • Project manager and creative services manager meet with program teams to schedule repeat work, then have weekly scrum to plan near term marketing communications needs • Project manager schedules work in Microsoft Project and Freedcamp, assigning specialised tasks to writer and designers • Project manager monitors project by walking around the work pods and asking for updates and through daily stand-up meetings where each staff shares "what they're doing, "what they're doing next", and "where they're stuck" • Other team members ask questions and check in on issues by talking directly over the work pod walls and through e-mail • Project manager meets with program managers to update project progress, organising triage as deadline, needs and financial potential shifts • Ad-hoc projects are managed with a physical Kanban board posted in an area visible to entire marketing department |

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| <p>Times</p> | <ul style="list-style-type: none"> ● Project timing driven by program departments ● Work started on a mostly first come first serve basis | <ul style="list-style-type: none"> ● Timing driven by strategic planning ● New projects go into a queue ● Work triaged by project manager based on revenue potential or relative importance of initiative to strategic plan ● Ad-hoc work scheduled on Kanban board for completion as time permits |
| <p>Location/s, Presentation style, Performance mode</p> | <ul style="list-style-type: none"> ● In Canango offices within marketing department work area ● Work is brought by program departments to marketing department ● Work style is cooperative with everyone having creative input in both copy and graphic design ideas, regardless of role ● Marketing department enacts a 'helper' ethos doing what department staff want | <ul style="list-style-type: none"> ● In Canango conference rooms (meeting of project manager and program managers) ● Work distributed in Agile work pods in marketing department ● Kanban board posted in Agile work pod area visible to all ● Marketing department adopts an 'Agile expert' ethos, advising and directing messaging and often overriding creative direction from program staff with this identity supplied and reinforced by vice president of marketing ● Work is organised in MS-Project, Freedcamp, and in paper notebooks and spreadsheets ● Individuals are held accountable for their performance ● Daily stand-up meetings happen around the project manager's desk in work pod area, with writers and designers coming to project manager and standing during meeting |

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| Resources | <ul style="list-style-type: none"> ● Excel spreadsheet to manage project timelines ● Meetings between program staff and creative staff ● Graphic design software ● Word processing software ● Email ● Others... | <ul style="list-style-type: none"> ● Daily standups ● Freedcamp collaboration software ● Microsoft project ● Standing desk ● Work pod desk layout ● Kanban board ● Design software ● Others... |
| Additions | | <ul style="list-style-type: none"> ● Project manager role ● Director of communications role ● One event planner ● Digital content coordinator ● Project management software ● Physical Kanban board ● Agile triage ● Daily stand-up meetings ● Personal accountability for delivery and quality |
| Deletions | | <ul style="list-style-type: none"> ● One designer terminated due to underperformance |
| Substitutions | | <ul style="list-style-type: none"> ● Vice president of marketing with a senior executive role in organisation takes place of departmental marketing director ● One writer leaves due to dissatisfaction with change in work arrangements, replaced with new designer ● Collaboration software is supposed to take place of email and excessive face-to-face meetings |
| Rearrangements | | <ul style="list-style-type: none"> ● Printing press operator moved out of marketing department into new role as operations manager which still includes printing work ● Creative staff no longer meet directly with program staff ● Creative staff have clearly delineated 'expert' roles |

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| <p>Normative regimes and corresponding artefacts</p> | <ul style="list-style-type: none"> • Co-operative helping ethos with group responsibility due to relatively soft boundaries between roles • Project direction lies with program staff | <ul style="list-style-type: none"> • Productivity • Individual accountability • Boundary construction due to Individual 'Agile expert' and 'Agile organiser' identities and Agile project management tools such as triage stand-ups and Kanban boards supplied by vice president of marketing |
|---|---|--|

Table 8-3. Social practice analysis of the deployment of a Kanban board at Canango. Various normative regimes establish eligibility conditions and establish boundaries

| Activities | Actors | Eligibility Conditions | Presentation Styles | Times | Locations | Eligibility Conditions | Resources | Eligibility Conditions |
|------------------------------|----------------|---------------------------|---|-------------------------------------|---|--|---|---|
| Designing the Kanban board | Ted | Project Manager role | Business casual' attire, walking around with project sheets and pen | 8:30 am to 4:30 pm Monday to Friday | Ted's standup work table | Provides relatively private large work surface | Poster paper, markers, post-it notes, poster tape | Large enough poster paper to be seen from work pods |
| Putting names on the board | Ted | Project Manager role | | 8:30 am to 4:30 pm Monday to Friday | Ted's standup work table | Provides relatively private large work surface | Marker | Contrasting colour |
| Putting up the Kanban board | Ted | Project Manager role | | 8:30 am to 4:30 pm Monday to Friday | Front wall of creative team work pod area | Visible to entire team at all times | Poster tape, Wall | Must be visible to all from work pods |
| Identifying tasks to be done | Ted | Project Manager role | | 8:30 am to 4:30 pm Monday to Friday | Ted's desk | Private work area | Project plans, meetings with program managers | Must be ad hoc tasks to be done between larger projects or while waiting during larger projects |
| Posting tasks | Ted | Project Manager role | Business casual' attire, walking around with project sheets and pen | 8:30 am to 4:30 pm Monday to Friday | Front wall of creative team work pod area | Visible to entire team at all times; Project manager role | Markers, Post-it Notes | Must be visible and moveable |
| Selecting tasks | Creatives, Ted | Name must be on the board | | 8:30 am to 4:30 pm Monday to Friday | Front wall of creative team work pod area | Visible to entire team at all times; name must be on board | Post-it Notes | Must be visible and moveable |
| Placing tasks under name | Creatives, Ted | Name must be on the board | | 8:30 am to 4:30 pm Monday to Friday | Front wall of creative team work pod area | Visible to entire team at all times; name must be on board | Post-it Notes | Must be visible and moveable |
| Completing task | Creatives, Ted | Name must be on the board | | 8:30 am to 4:30 pm Monday to Friday | Creative team member desks | Access to creative production software | Creative work software | Creative staff must have creative skills and ability to use the software |
| Moving task to 'Done' | Creatives, Ted | Name must be on the board | | 8:30 am to 4:30 pm Monday to Friday | Front wall of creative team work pod area | Visible to entire team at all times; name must be on board | Post-it Notes | Must be visible and moveable |

Table 8-4. How Ted, Shirley, and Sam help make the world of Agile marketing at Canango

| Person | Example Action - Artefacts (bold italics) | Outcomes |
|------------------------------|--|---|
| Ted (Agile organiser) | Produces <i>Kanban board</i> | Team adopts, de-facto, Agile organiser 'identity' through a structural tool, becomes a semiotic resource for positioning vis a vis program staff |
| Shirley (Agile organiser) | Produces <i>paper to-do list</i> | Escapes disruptive e-mails; Stays organised; Stays focused; Stays sane; Feels competent and productive |
| Sam (Backdoor rebel) | Produces 200 copies of a <i>poster</i> designed by the housing department, using his <i>computer and colour copier</i> , without the marketing department being involved | Sam feels like he helped a colleague who needed help, in-turn helping the people served by Canango, rather than following alien Agile marketing procedures under the control of the marketing department which may cause delays |

Chapter 9. Entering the figured world of collaborative Agile work platforms

9.1 Introduction

As discussed in Chapter 6, one of the key characteristics of Agile marketing, and indeed the specific forms of Agile project management upon which it is based, is the organisation of workers into self-managed teams. Along with the popularity of this form of organising has come various types of ‘collaboration’ software, ostensibly designed to improve project management processes by offering highly flexible multimodal forms of communication across spatio-temporal boundaries (Anders, 2016). The widespread adoption of such software has impacted the way that people work, with implications for how people see each other and see themselves in the workplace (e.g. Orlikowski 1992). Previous chapters have dealt with the adoption of Agile project management methods by marketers at Canango, and how they affected marketer identity work. Now I will consider what happened when management introduced a collaboration platform called Monday.com which changed important components defining the figured world of Agile marketing as realised at Canango, including roles, activities, communication styles, and positionality. In particular I will look at the various semiotic artefacts and social practices which define the evolving world of Agile marketing at Canango and how changes to these artefacts in turn affected ‘who’ it was possible for the marketers at Canango to be.

Despite the organisational changes underway across marketing departments, there is almost no academic literature about structured Agile marketing as understood in the practitioner literature. Rather, studies focus on higher order constructs such as ‘marketing agility’ (E.g. Kalaignanam et al., 2021; Kouatli, Elkhilil & Karam, 2020; Lewnes, 2021; Poolton et al., 2006) or ‘dynamic

marketing capabilities' (E.g. Barrales-Molina, Martinez Lopez & Gazques-Abad, 2014; Wang, Hu & Hu, 2013; Xu, Guo, Zhang & Dang, 2018), and the few studies which explicitly use the term 'agile marketing' either do so with respect to the aforementioned constructs (E.g Poolton et al., 2006), or others such as 'agile marketing capability' (Moi, Cabiddu & Frau, 2019; Moi & Cabiddu, 2021), 'strategic agility' (Hagen, Zucchella & Ghauri, 2019), 'growth hacking' (Conway & Hemphill, 2019), a management fashion perspective (Madsen, 2020), and agile manufacturing (Poolton et al., 2006). In each case the underlying assumption of these studies is that Agile marketing relates to a characteristic, i.e. 'agility', possessed by an organisation. Although such approaches are common in mainstream management and marketing research like the papers cited above, they suffer from a lack of insight about the people at the centre of practice and what agile marketing means to them, ignoring the importance of local level action and understandings as drivers of larger scale change.

This chapter, in keeping with the rest of the thesis, takes a fundamentally different perspective. Rather than understanding Agile marketing in terms of a capability I see it as a socially constructed 'world' inseparable from social practices and Discourses in action (Gee, 2014a; Scollon, 2001) which index membership within that world and which both possess and produce artefacts which are drawn upon by people as they 'author' the identities that they believe will help them be successful in that world. The ways in which the artefacts produced by monday.com impact the figured world of Agile marketing at Canango is the focus of this chapter.

My approach challenges antecedent research about Agile marketing based on mainstream firm-level constructs such as those just mentioned. Far from finding the 'one best way' to 'do

Agile’, the Canango case illustrates the situated reality of what happens when people variously conform to, resist, and co-construct different ways of being Agile in the service of common goals. The result is several contributions to marketing management scholarship. The first contribution offers empirical material which helps build an understanding of the sorts of semiotic resources and social practices associated with increasingly popular software platforms such as Monday.com and their implications for how marketers enact their identities as they engage in Agile marketing. The second contribution is theoretical and provides an explanation for why Agile marketing implementations turn out differently than initially hoped. Worker identities are neither wholly determined by structures which give shape to practices nor do workers have complete control over processes of identity construction. Instead, I illustrate the ways in which Agile processes and technology such as Monday.com captures and resemiotizes social practises and makes them available to both their creators and others across time and space, acting to bridge multiple worlds and identities.

In order to achieve my aims, I undertake a multimodal discourse analysis of the collaborative work platform Monday.com as used by the marketers at Canango. I then conclude with an explanation of how collaborative software platforms serve as intermediary spaces of authoring to bridge multiple figured worlds, compressing positionality as artefacts such as corner offices and aisle seats are eliminated.

In this chapter I consider available spaces of authoring in three figured worlds: the earlier NGO helper and Agile marketing worlds discussed in Chapters 5, 6 and 8; and a new world still very much in flux ‘inside’ the Monday.com collaboration software environment which happens both

in the Canango offices, and virtually online after the Canango marketing team moved to their home offices due to Covid-19 pandemic protocols.

The concept of Agile marketing practice has already been discussed in some detail in Chapter 6; however, as a reminder, Kotler, Kartajaya & Setiawan have defined Agile marketing as ‘the use of decentralized, Cross-functional teams to conceptualize, design, develop, and validate products and marketing campaigns rapidly’ (2021, Ch. 1, para. 37). More specifically, for this study, ‘Agile Marketing’ comprises a specific set of practices and project management tools informed by frameworks which have been widely adopted by the software development community. Commenting for McKinsey & Company, Edelman et al state, ‘Agile, in the marketing context, means using data and analytics to continuously source promising opportunities or solutions to problems in real time, deploying tests quickly, evaluating the results, and rapidly iterating’ (2016: NP). Meanwhile, figured worlds were defined as, ‘a socially and culturally constructed realm of interpretation in which particular characters and actors are recognised, significance is assigned to certain acts, and particular outcomes are valued over others’ (Holland, Lachicotte, Skinner & Cain, 1998, p. 52). Agile marketing is thus a prime example of a contemporary figured ‘sub world’ within the ‘master’ figured world of marketing. In keeping with Holland et al’s (1998 p. 52) definition of a figured world Agile marketing is defined by ‘particular characters’, E.g. the scrum master, ‘significance is assigned to certain acts’, E.g. daily stand ups, and ‘particular outcomes are valued over others’ (E.g. iteration over fixed plans).

9.2 Studying collaboration platforms as figured worlds

I follow Van Leeuwen and Djonov (2013) who, discussing the growing field of software studies, '[reject] the widespread view of software as a neutral tool [...seeking...] to open computer science to critical perspectives' (NP). One way that Djonov and Van Leeuwen (2018) do so is to extend the work of Van Leeuwen, 2005, and Zhao et al (2014), by moving beyond looking at software as a semiotic resource, to also view it as a social practice and understand the processes of meaning making embedded in software use. Their work therefore aligns naturally with Holland et al's (1998) concept of figured worlds which incorporates symbolic artefacts, practice and meaning to bridge the structure and agency divide and understand the co-constituting nature of software use, design, practice and identities of users. I now adapt Djonov and Van Leeuwen's (2018) analytical approach which I previously used in Chapters 7 and 8 to apply my core analytical framework. Doing so affords a systematicity which allows for easier comparison of people, practices, platforms and cases.

My choice to adapt models which consider software as a semiotic resource *and* social practice to outline the parameters of a figured world, stems from the unique characteristics of collaboration platforms such as Monday.com. Not only do such platforms possess many of the same features as social media websites (posting and commenting, live chat, web link sharing, embedding multimedia content, and so on), but they also offer the integration of numerous third-party semiotic software applications such as word processors, spreadsheets and survey design programs, allowing users to also embed the affordances and associated practices of each of these applications within Monday.com. The experience of using Monday.com is therefore potentially

quite different for users in different organisations and teams; however, core design features exist and I will initially focus on those before exploring the specific ways that the marketing team at Canango uses and *does not* use the platform.

9.3 Collaboration platforms as figured worlds

As related earlier, figured worlds provide artefacts within a socioculturally constructed ‘realm of interpretation’ that establishes how people acting within that realm understand what are considered to be ‘normal’ ways of being, which serve to mediate behaviour within that figured world (Holland et al., 1998: 52); they also position people and this positioning defines the spaces of authoring in which people have agency to construct and deploy identities and change worlds (Holland et al, 1998). Monday.com provides for an interesting study in the way that workers come together via software to produce, sustain, and modify figured worlds. I begin by reviewing the socio-cultural context of Monday.com then look at the first level characteristics of the platform to build an inventory of available semiotic resources. I will discuss their possible significance in relation to the worlds of NGO marketing and Agile marketing, as well as what changed when Canango adopted Monday.com.

Djonov and Van Leeuwen note key ways in which social media software and semiotic software differ. For example, while semiotic software offers certain choices of tools that may be used for a relatively wide range of practices, social media sites offer a more limited range of options for producing semiotic materials (Djonov and Van Leeuwen, 2018). This has to do with the restrictions put in place by engineers to facilitate the packaging, organising, and distribution of the materials produced by social media participants across the site and as advertising related data

(Djonov and Van Leeuwen, 2018). Monday.com is different in that users have choice in the software integrations they wish to deploy; however, practices remain guided by certain assumptions built into the software.

9.3.1 A multimodal perspective

As we have seen, figured worlds supply artefacts which serve as cultural tools, mediating our individual and collective identity building processes, serving to regulate behaviour. Today's digitalized worlds of work offer a wide range of cultural tools providing access to powerful diverse resources for semiotic production and practice. These include not only text but also images, audio, video, and software (algorithmic) forms which have the potential to disrupt traditional spatio-temporal relationships. Digital tools permit non-linear collaborative interaction as well as the capture, preservation, modification and re-deployment of past activity. Gaining an understanding of how such tools are used in identity enactments in figured worlds demands a multimodal analysis of spaces of authoring and identity work, moving beyond single method investigations such as the analysis of interview data.

The next section discusses the methods I employed to gather empirical material, as well as the analytical framework I used to interpret this material and draw some conclusions about how figured worlds change and are changed by the people, practices, and artefacts of which they are composed. I then outline a short history of marketing worlds at Canango, leading up to the adoption of Monday.com followed by a multimodal analysis of monday.com, explaining the semiotic resources and social practices which construct the figured world of 'monday

marketing'. I complete the chapter with a discussion of the implications for meaning making and identity work by marketers within practices of platform-based Agile marketing.

9.4 Research methodology

I used an abductive strategy incorporating multiple methods for the collection and analysis of empirical material (Lorino et al., 2011; Simpson & den Hond, 2021; Watson, 2011; 2017). Participant observation in both an office and online setting, semi-structured interviews with eight members of the Canango marketing team, multimodal discourse analysis, and thematic analysis were all deployed in my investigation. Initial implementation meetings were attended and observed with interviews conducted at the time monday.com was first deployed and then again three months later by phone since Covid-19 protocols had already been initiated and the marketing team had begun working from home. Full access to the software was provided to me and I was able to observe all project scheduling, communication, and administration activities. Extensive screen captures were made with individual and partner organisation identities anonymized or pseudonymized for privacy during reporting. As the implementation progressed, field notes and content was analysed in parallel with relevant literature as new threads of meaning emerged (Schwartz-Shea & Yanow, 2013; Tracy, 2013). Field notes and interviews were analysed thematically with the goal of identifying relevant higher-level discourses germane to the figured world of Agile marketing. Multimodal content within the Monday.com environment was categorised thematically and inventories of both semiotic and discursive resources were produced. I then studied how these resources were used in relation to themes which emerged from the interview material to build an understanding of how they were drawn upon as resources for identity work by the marketers at Canango. To do this I adapted the

multimodal social semiotic framework developed by Djonov and Van Leeuwen (2018) and Van Leeuwen (2008) discussed below.

9.5 Empirical material

9.5.1 Marketing at Canango: the backstory

My approach to empirical research about ‘how things work’ (Watson, 2011) emphasises the importance of considering the cultural and historical context within which the phenomena under investigation occur (Gee, 2015; Holland et al., 1998; Jones, 2016; Scollon, 2001; Wertsch, 1991), rather than focusing on a cross-sectional sample defined in relation to discrete variables. Accordingly, I reference earlier observations about ‘marketing life’ at Canango.

9.5.1.1 The ‘NGO helper world’

As related in Chapters 5 and 8, Canango has operated in a social service capacity for more than 50 years. For most of its history the organisation was volunteer driven and community led; however, in the past decade management and operations have been ‘professionalised’. Until Robin’s arrival, the marketing department had what could be characterised as a distributed helping culture based on functional equality.

As we saw in Chapter 8, Sam epitomises this outlook:

‘I’m the guy that does everything and anything for anybody...[for] ALL the different departments [...] I just take over and do what I gotta do. If you need it, I supply it. I try not to make people wait. Everybody’s job is important’.

Lawrence provided his views on how things used to be:

'I used to be involved with the client, I'd be involved directly with communicating and meeting with them. I would, as a designer, be sitting with them at meetings. And people from upstairs would come directly to me to ask for something. Now that's almost completely stopped since Robin came on board and Ted took on this new role and he's become more of a gatekeeper'.

Margaret, however, felt that the helper approach was problematic in a key way:

'You didn't know what your priorities were, who came first, who came second. And it's, you know, it's we are client pleasers here, we try to bend over backwards. Whoever needs something, we want to get it for them. And so nobody sat back and took the 10,000 foot view'.

It is this potential for inefficiency and misallocation of effort that was the stated impetus for Robin and Ted to introduce Agile methods like those described earlier; however, it also indicates different understandings of the way things work at Canango, diverging between a world in which functional boundaries are diffuse and work is driven by the program managers, who bring work to the department, as compared to a world driven by strategic planning, prioritisation, and professionalisation with the goal of increasing the efficiency and effectiveness of the marketing department.

9.5.1.2 The world of ‘Agile marketing’ at Canango

I introduced the shift from the NGO helper world to the Agile marketing worlds in the last chapter but briefly reiterate it here for convenience. The key change manifested with the introduction of Agile marketing was functional specialisation. The most important development was a role change for Ted from that of writer to that of marketing project manager. His job was to prioritise work, communicate deadlines, monitor progress and serve as an intermediary between the program managers and the rest of the marketing team. Along with the introduction of the project manager role came functional specialisation with clearly defined design, writing, events, and digital content roles. The day to day work of all functional areas was now formally overseen by a director of communications (Andrea). Robin, as Vice President of Marketing would provide overall direction and serve on the executive leadership team of the entire organisation.

The enactment of these role changes involved a number of Agile marketing artefacts (See the row called *Location/s*, *Presentation style*, *Performance mode* in Table 9.1, green text): physically arranging people in open ‘work pods’, daily standup meetings where everyone gathered in a circle and reported on their current work status, the use of a Kanban board to self-assign ad-hoc projects and make work status visible to the overall team, as well as the implementation of a group work software platform called Freedcamp. The purpose of the software was to encourage faster communication about work and to make people accountable; however, it was never fully embraced by the creative team due to design flaws in the software itself, as the following interview excerpt illustrates:

Lawrence: 'As a visual designer [...] Freedcamp just makes me want to tear my hair out. I find it so frustrating and inefficiently designed. I just, it's maddening and it generates a ton of email that I don't have time to look at. And then there's so many different doorways [...] they don't always end up in the same place. To me it's just horribly designed.'

Earlier we saw how Freedcamp served as an important mediational means, along with daily stand-up meetings and a Kanban board, for Ted to instrumentalize his identity as an 'Agile organiser' in his role as project manager. At the same time, however, Shirley and Lawrence vigorously indicated that Freedcamp was a barrier to being able to do *their* jobs and feel like effective designers.

Now, with Ted having moved to a new organisation, the senior managers have decided to implement *Monday.com* which, they hope, will also help to further restructure the department and allow Canango to increase production by replacing a project management layer with additional creative workers. It is this context in which an all department meeting was held to introduce the marketing teams to the proposed new platform.

9.5.2 A meeting to introduce Monday.com

The importance of the meeting was made evident by Robin who acknowledged that this was the first meeting of the entire department that they had held for a long time; he also stated that the fundraising team was behind on numbers and starting to panic and taking a 'spray and pray' approach so the marketing department would have to be ready to 'buckle down' and in effect,

‘rescue’ the fundraisers. Andrea, the director of communications, who is now also the immediate supervisor of the marketing staff, went on to discuss the main features and benefits of the platform. Field notes from the monday.com introduction meeting suggested the following themes as most prominent: *Transparency*, *empowerment* (no project manager layer), *responsibility*, *accountability*, *communication*, and *efficiency*.

Early in the meeting, team members frequently looked back and forth between each other without saying anything as Robin and Andrea talked about the platform and its features, likely indicating wariness. The flow of conversation was from either Robin to the entire group, Andrea to the entire group, or other team members to Robin or Andrea. Only rarely did an individual other than Robin or Andrea make a statement directed at the entire group and never directly to another individual co-worker. Everyone took notes on paper using pens, and nobody brought along a laptop for note taking except for Andrea and Robin. Both Andrea and Robin spent most of their time emphasising the benefits that they believed the software would offer, such as greater autonomy in initiating projects, the ability to clearly see upcoming deadlines, and the ability for ‘everyone to see what everyone else is doing’ which was only presented as a benefit in that it would improve communication efficiency, as opposed to the possibility that people may feel they are under group surveillance (E.g. Barker, 1993). Robin also argued that the platform’s chat feature was better than e-mail because it would provide the ‘benefit’ of enabling constant communication.

A third of the way through the meeting, the group watched a short video (See Exhibit 9-1) which provided an overview of the main features of Monday.com. The video was underscored with

high-energy music and all content and narration was relentlessly positive, with the theme of ‘transparency’ a constant. Andrea used humour to attempt to lighten the atmosphere, joking about how the high energy music is what made her decide on the software.

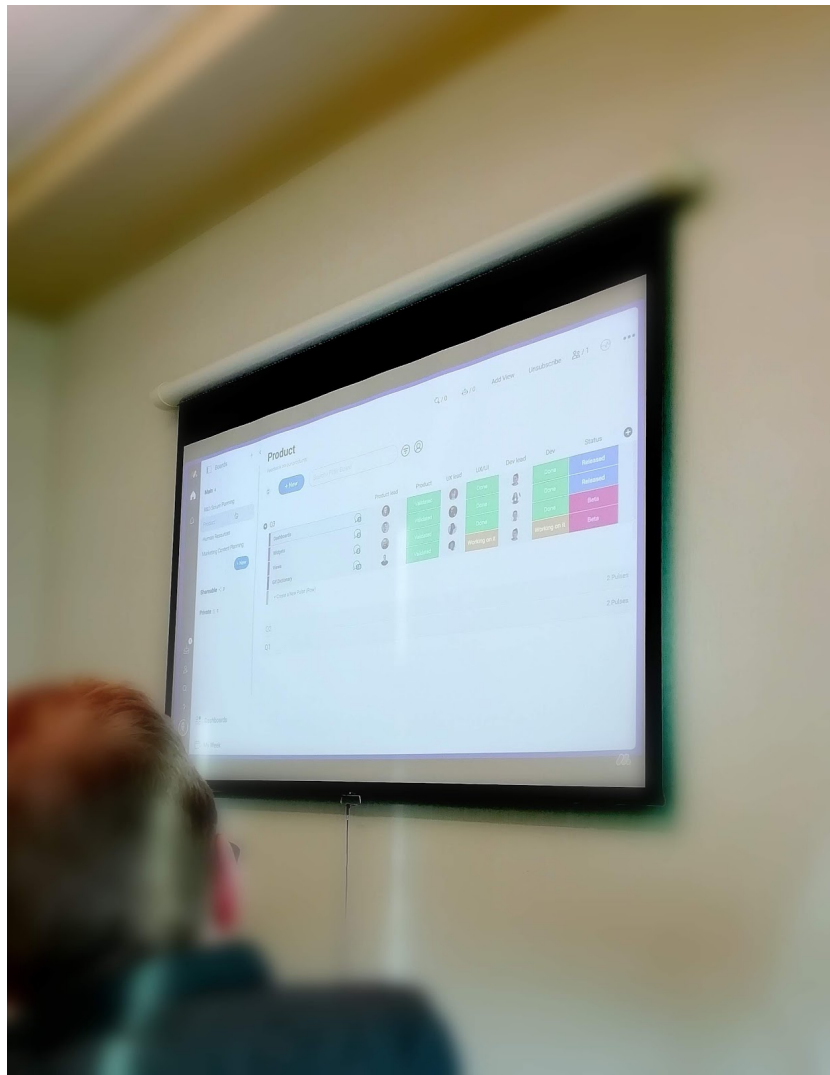


Exhibit 9-1. A Canango marketer watching the Monday.com onboarding video

One of members of the events team noted that the software looked ‘pretty’ and Andrea joked that her main concern was that the designers would want to look at it, garnering a light chuckle

around the table and a response from the senior designer Lawrence, ‘Yeah, I’m a curmudgeon’, generating a laugh from the others. The team then watched a more detailed video showing how the platform could be used in a similar setting as the Canango marketing department. Team members began commenting aloud about specific features they liked such as the colour coded task statuses and the custom columns for keeping track of budgets. Then Robin pulled up an instantiation of Monday.com and demonstrated a feature, sending a guest invitation e-mail to Miriam, a senior member of the events team, who then accepted the invitation on her iPhone. A message popped up live on the overhead conference screen saying, ‘Miriam has joined the team. Yay!’ Everyone laughed and the group started asking about specific features as momentum toward acceptance built in the group. The meeting ended with Lawrence stating, ‘When are the invitations going out? I’m ready to use it!’

The above vignette sets up the context within which Monday.com was introduced to the marketing team. Unsurprisingly, there was some initial wariness and scepticism about the software. Later Lawrence notes that this is the third platform they have now tried so he doesn’t want to put too much faith in it. Ultimately, however, when the team sees potential for the software to help them be effective they become enthusiastic about it and the stage is set for the team to begin the slow process of co-creating a new figured world of work.

9.5.3 Monday.com: the socio-cultural context

Like research that takes a Figured Worlds perspective, Djonov and Van Leeuwen’s (2018) model for studying software as both semiotic resource and social practice, with its roots in social semiotics, asks us to attend to the socio-cultural context within which the software is used.

Monday.com operates within a set of assumptions which, as we shall see, make their presence felt inside the software and subsequently shape who it is possible to be when inside the platform, whether actively using the platform or not. It is also important to note, from a social semiotics perspective, the importance of seeing the presence of various modes as semiotic *choices* (Van Leeuwen, 2005); it is assumed that they exist because someone decided to use them for reasons that were meaningful, or made sense, to them.

To understand the artefacts which comprise the figured world of Agile marketing as practised inside Monday.com it will help to consider the cultural and historical underpinnings of the platform itself. The company emerged as a startup in Tel Aviv in 2014 and underwent several large rounds of venture capital funding after 2017, eventually undertaking an IPO, which it accomplished in June 2021 with an initial valuation of \$6.5B on the NASDAQ exchange. Stereotypical features of ‘startup culture’ (Entrepreneur, 2015) (<https://www.entrepreneur.com/article/248537>) are evident in the company’s web presence, advertising, support materials, and importantly for this study, within the software itself. Since an exhaustive analysis of Monday.com’s entire web presence and marketing content is well beyond the scope of this chapter, I will limit my review to the onboarding video shown to the workers at Canango in the Monday.com introduction meeting discussed above, as well as a post from the company’s engineering blog which is revealing about how Monday.com Ltd. operates its own business.

Several things are immediately apparent about what is considered normal in the world of the Monday.com user, according to the company onboarding video (See Exhibit 9-2) and video at

<https://youtu.be/ObkWrfukomA>). Subjects are depicted as young and ‘hip’ (E.g. sporting earlobe gauges, tattoos, knitted hats, ball caps, beards, and chore jackets). Workers are shown in open plan workspaces decorated in trendy ways, doing some sort of knowledge work such as marketing, aircraft design, logistics, or architecture. At least half of the work environments depict the use of Apple computers, even though MacOS comprises less than 15% of the global personal computer market (Statista, 2022b). In several cases, alcohol bottles are visible on desks or office shelves. In two separate instances the storyline returns to the theme of startups. One example shows a list of startup employees on an HR interview board commanding salaries ranging from \$400-thousand to \$2-million per year. Ultimately, however, the dominant theme is productivity through adaptability, feedback, transparency, accountability, teamwork, and measurement as evidenced by the following onboarding video transcript excerpts:

‘We’re going to build a process [...] we can see which agent is in charge of each property [...] the building blocks of your workflow [...] adaptable to any process no matter the industry or business’

Repeated use of such words and phrases as ‘we’re’, ‘we can’, ‘build’, ‘building blocks’, ‘adaptable’, ‘no matter’ all suggest teamwork, action and flexibility respectively:

It’s a platform that adjusts to your team’s needs [...] the go-to solution for every process or problem [...] a classic scrum iteration [...] data from the board can be visualised [...] see the breakdown of the size of story points or to see the progress of tasks [...] this product feedback board is a real use case from within Monday.com [...] we’ve created an integration [...] support tickets [...] posts those tickets here [...] for everyone to see. [...] product managers can instantly see

feedback about the products they're building. This is how Monday.com creates real transparency not just by having the data somewhere but by making it easily accessible to everyone [...] integrations in Monday.com take data that was hidden in dark places and makes that data available to everyone in one clear place [...] Monday.com is a space for team collaboration so when the marketing team is working on the next video campaign they can share their thoughts in one spot no email chains, group texts or waiting on approval [...] 'Dashboards let managers get key insights and metrics from multiple boards all in one place' [...] visualise the information that's most important to you [...] these can be broadcasted on screens around the office...'

Once again flexibility and productivity is emphasised by using words and phrases such as 'adjusts', 'every', 'progress', 'instantly' 'no email [...] or waiting'; however, now terms from agile software development are introduced, such as: 'scrum', 'iteration', 'story points', 'use case', 'integration', 'support tickets'. Moreover, an ethos of analysis, transparency, and audit/surveillance is sold through such phrases as: 'can be visualised', 'see the progress', 'for everyone to see', 'see feedback', 'real transparency', 'accessible to everyone', 'was hidden', 'available to everyone', 'clear', 'dashboards', 'metrics', 'broadcasted on screens around the office' along with the recurring use of the word 'data'.

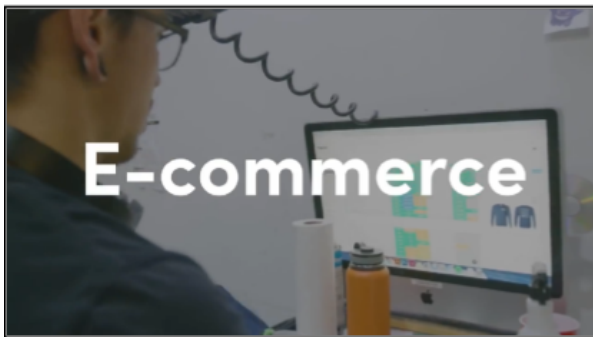
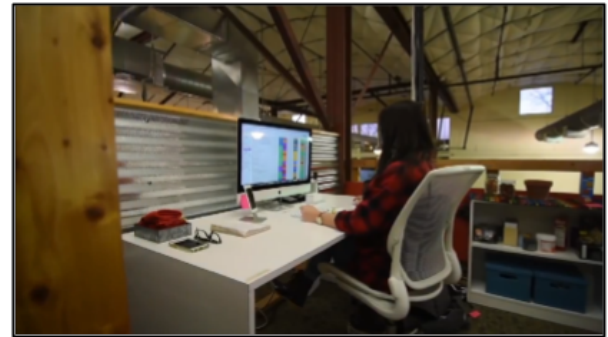


Exhibit 9-2. Images of ‘normal’ work environments presented in the Monday.com onboarding video shown to the Canango marketing team by management

Moreover, the video transcript excerpts align with the following passage from a Monday.com engineering blog post about the company’s own *internal* business intelligence software, called ‘BigBrain’, further illustrating the extent to which the idea of extreme data gathering, tracking, and accountability drives the company culture:

'BigBrain tracks every cent that goes in and out of the company. We also track every single event: if someone went to a webinar, replied to an email, added a new column to a board, we host it all in BigBrain. With machine learning and data modeling, we're able to do any kind of analysis on all the data. We collect and process over 2 million events every day from many disparate data sources [...] Every employee in monday.com uses BigBrain every single day as an integral part of their work to monitor their performance. For example, in our product, we run a lot of A/B tests on features; all that's measured in BigBrain [...] BigBrain allows us to realize our vision of transparency inside the company. We create dashboards for each department that displays their KPIs [For the support team] there's a huge TV screen run by BigBrain that displays their average response time. The goal is to always keep it under 10 minutes, which is seriously impressive considering that the industry average is 18.2 hours' (Monday.com, 2020b: NP). <https://engineering.monday.com/meet-the-geniuses-behind-our-bi-tool-bigbrain/>

This excerpt is remarkable in its description of a totalizing system of worker surveillance. Every event is captured and analysed. Of note, employees ostensibly use BigBrain to monitor 'their' performance, undoubtedly realising that their supervisors are monitoring their performance, as well, along with every colleague via the KPI dashboards displayed on 'huge screens' in the office for all to see (See Exhibit 9-3).

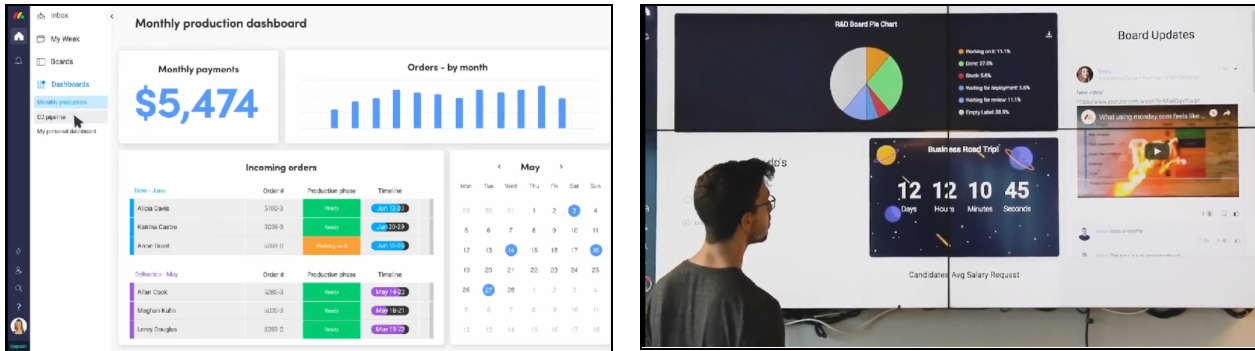


Exhibit 9-3. More screen captures from the Monday.com onboarding video shown to the Canango marketing team by management. These images of a local desktop performance dashboard and a large dashboard visible to the entire office align with the account of life inside Monday.com Ltd. and its own internal business intelligence software called ‘BigBrain’

I next undertake a multimodal analysis of the Monday.com work environment as implemented at Canango.

9.5.4 Monday.com - neoliberal start-up culture colonises the workplace

I will now review the main components of the Monday.com platform, drawing upon Djonov and Van Leeuwen’s (2018) framework for the analysis of software as both *semiotic resource* and *social practice*. Through my analysis I will identify and interpret the various technical and social artefacts associated with Monday.com, along with the culture supplied by the developers of Monday.com, which combine to begin producing the figured world of *Monday marketing* as constructed at Canango.

9.5.5 Semiotic resources in Monday.com

Space limits preclude an analysis of every screen and feature of the software. I will therefore focus on the ‘workspace’ view which is the core view on the platform. I describe the immediate

visual impression that Monday.com delivers as ‘clean’, ‘open’, and ‘minimalistic’. The dominant colour is white which serves as the primary background, while a limited colour palette ties into the three colours used in the brand logo: bright red, amber and green. A narrow sans serif typeface is used throughout with main headings in bold.

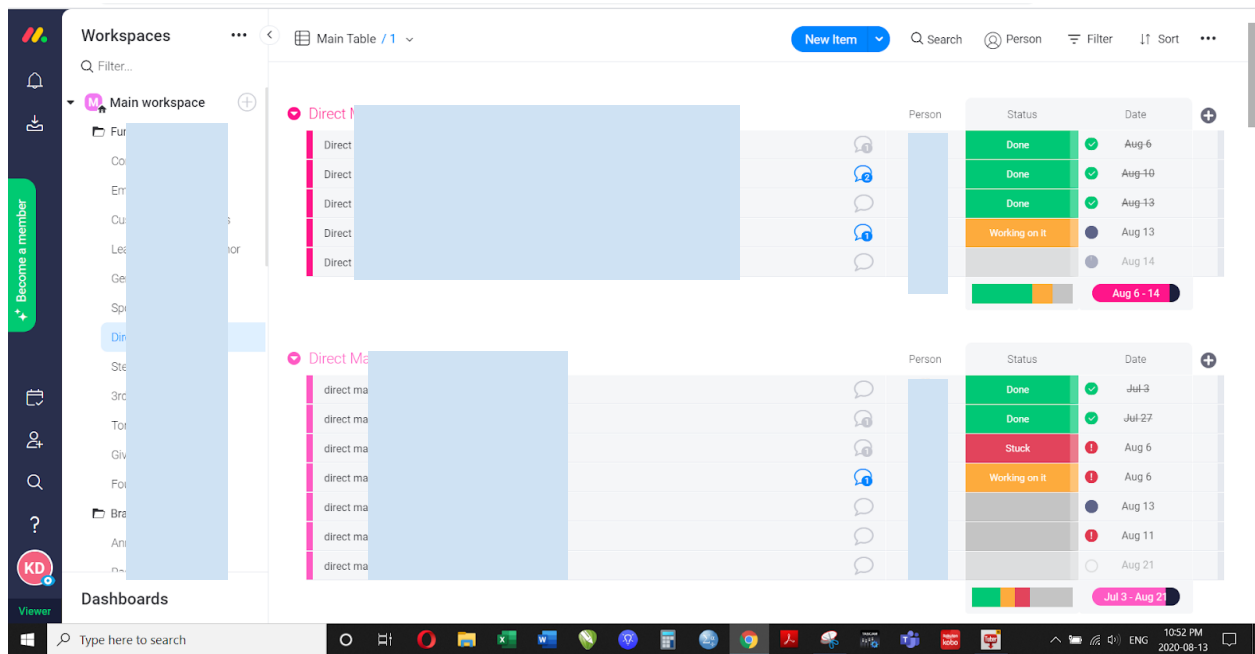


Exhibit 9-4. A typical Monday.com workspace at Canango showing ‘boards’ for two projects: a direct mail postcard and a direct mail letter

Projects originate at weekly planning and review meetings, equivalent to an Agile ‘scrum’ held between the marketing department senior managers (Robin and Andrea), senior creatives (Ivy and Lawrence), and various program managers from different departments, most commonly with the fundraising department. After these meetings, Andrea creates a ‘board’ (a sort of graphical spreadsheet, as shown in Exhibit 9-4) for each new project or makes changes to existing boards

based on planning meeting outcomes. Surface level impressions (Pauwels, 2011) show the continued use of a clean white background, sans serif typeface, bright primary colours, the brand logo, the standard control bar on the far left column and the workspace and dashboard selector column just to the right of that. The tool icons on the left hand toolbar have salience and meaning for people's sense of agency and identity. For example, Margaret, the copy editor has attached special salience to 'the little icons' and the search function which she anthropomorphizes and to which she ascribes agency (indicated in bold text):

*The search function is freaking awesome. Yeah. I click **that little question mark**. **I can ask it to find** everything assigned to me from this date to this date. So **that search just makes me confirm** by the end of the week that I am on track. And I look for any status updates that I haven't filled out, so if I have something to do or something finished, and I haven't changed it to done or stuck or **whatever the little icons are** for that project. And then once a week I do a global search for everything with my name on it, and I go back a few weeks ... and I go forward a week just to make sure I haven't missed anything in between. **And it tells me what to do**. And that has really helped and really **made me feel like I'm on top of it**.*

The main workspace area is dominated by two spreadsheet-like project boards which feature rows of tasks, iconographic indications of whether there are any worker comments associated with a task, avatars of the people assigned to each task (more on these below), a status column, and a due date column.

One of the most salient semiotic resources in the workspace is the three colour coding scheme used to indicate task status: green for ‘done’, amber for ‘working on it’, and red for ‘stuck’. Aside from these colours being used in the company logo, they are also an obvious reference to the international standard colours for traffic lights and their meaning states of ‘go’, ‘prepare to stop’, and ‘stop’. Notably, the layout places the colour blocks directly beside the avatars of the worker (although this column, like all columns, can be repositioned by the creative director at will), creating an instant visual narrative about who has finished their task, who is working (one assumes productively) and who is stuck. Individuals who continually have red beside their avatars are potentially positioned as ‘always stuck’. Social pressure is then brought to bear for workers to change the ‘reds’ to amber and green as quickly as possible, particularly since the rightmost column provides a due date. The use of these colours in the company logo, as already noted, also signals the importance of this sort of measurement and sorting pressure to the overall ethos that underpins the Software and the figured world it helps to construct.

Margaret, once again: *I think people have found their own little processes and ways to include it in their routine. So I rarely see any no status updates beside people's names. It lets you know if people haven't been updating. Because the status box is grey rather than red or Green. If I see no status I know that they haven't even looked at the project.*

Below the status column is a horizontal bar that measures the relative colour state and overall project status as well as how close the project is to being behind schedule. This constant reminder of the status of any project next to the due date serves as a colour-coded ‘ticking clock’

not unlike the sort of tension-inducing plot device used by authors of popular novels to keep readers motivated to finish the book.

Returning to the avatars feature, users may upload images of their choice to use as their personal avatar, or they may simply use the default name initials and system-provided colour background. In the case of Canango workers, a range of avatar styles is evident, from straightforward photo ‘headshots’, to classic comic book characters, to cartoon renderings of photos prepared by online cartoon apps, to photos of actors in popular movies. Most people have their images upright in a normal portrait orientation but one person has rotated her image 90-degrees counterclockwise.

I will not undertake an exhaustive analysis of avatars in this chapter since other scholars have already published articles about avatars, (e.g. Belisle and Bodur, 2010; Nowak and Fox, 2018, Schultze, 2014; Von der Putten et al., 2010); however, in speaking to Canango marketing staff about their avatar images and why they chose or created the ones they did, most of the team said that they felt the image that they selected ‘looked cool’ or they wanted ‘something fun’. For example:

Researcher: one of the first things I noticed is that everybody has a different sort of little avatar associated with their name. How did you come up with yours?

Lawrence (comic book character avatar): I think I just didn't want to put my own face on there like I don't know, it was just sort of a whimsical thing, but I probably didn't put too much thought into it like I might have had.

Siobhan (events coordinator): To be honest it's sideways because that's how it was from my selfie and when I uploaded it I didn't know how to make it upright so it would fit. Hahaha!

Margaret (copyeditor, has a highly stylized letter 'M' as her avatar): So I just wanted something clean and simple. That sort of spoke to my love for typography and I just, I wasn't able to find a way to make a caricature of myself like a cartoon. Ivy has a really good one. And since I've started working from home I just haven't had time to update my avatar game, haha.

Ivy: I came across this software where you can like make your own avatar cartoon, you know? And I thought it was cute. But on (Microsoft) Teams I use my actual photo with a real picture but in Monday.com I think it's fun to make your own. Like having one with your feet up on the nuclear power controls, haha.

Interestingly Ivy has chosen her 'actual' photo for use in Microsoft Teams which she uses to communicate and meet with people both inside and outside the department and organisation. Monday.com, on the other hand, is used to communicate about work only within her department where she feels it is suitable to have fun to the point of wanting an avatar showing her feet up on the controls of a nuclear power station (an image associated with the Homer Simpson character in the Simpsons animated television series).

9.5.6 Chat window: constructing and capturing identities

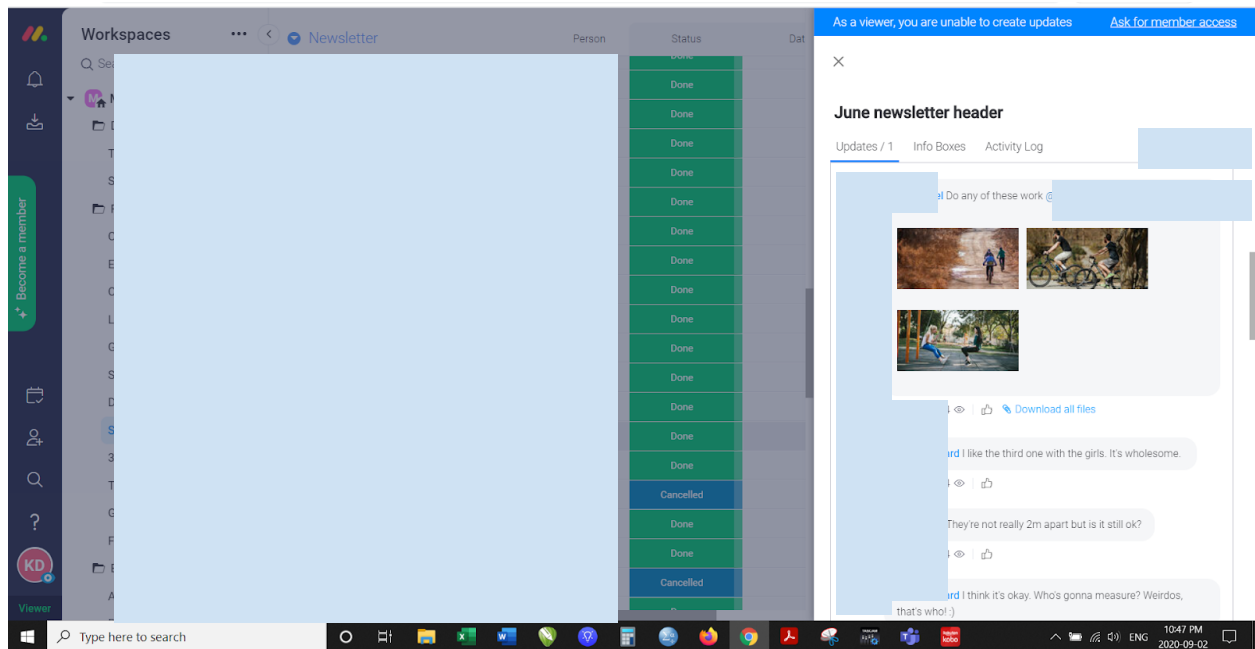


Exhibit 9-5. The chat window, lower right side of image, allows marketers to chat in real time about issues, insert media, and link to semiotic applications such as word processors or design applications

An important feature within Monday.com is the chat window (Exhibit 9.5) which affords the ability to directly communicate about any task with any member of a team. It is possible to insert media, as well as actual live work screens from apps such as MS-Word. The potential semiotic production capability is significant. The above screenshot captures one of many examples of Shirley and Ivy discussing the choice of image for a newsletter (Andrea is also tagged in the chat). Ivy, the writer, is being asked by Shirley, the designer for input on imagery, something that would not normally have happened under Agile marketing managed by Ted (Ivy had even commented specifically about not liking to hand over her copy to the designers because she

would never see it again). This boundary spanning communication harkens back to the earlier NGO world of softer role boundaries where, as Robin put it, ‘everyone had a piece of everything that came to the department’. In the example we also see Ivy’s more playful nature come through in her choice of frame filling cartoon avatar image and use of a smiley emoticon following an irreverent comment. The more serious Shirley, meanwhile, keeps her comments more factual and her avatar features a photograph of herself that places her low and off-centre in the frame, almost as if she does not quite want to have to have an Avatar or be seen in the photo. Even so, the chat feature is not used to its fullest extent at Canango. The following excerpt shows a typical conversation about a specific project. What is notable is the directness of the communication. There is far less off-topic chatting and visiting on the platform itself, compared to what was observed by the researcher in the physical cubicle based work area in the Canango offices. For example:



Andrea Martins

Mar 18

Hi @Shirley Scruggs! This is a 600px wide graphic for email. Look back to what was done last year. Something simple that shows our appreciation. Thanks!



Liked

5 Seen

Like

Reply



Shirley Scruggs How's this?

Mar 234



Andrea Martins I like he background, maybe switch to a Housing Helps look

Mar 2641



Shirley Scruggs Hi @Andrea Martins is this better?

Mar 264



Andrea Martins That'll work. @Margaret Morris this is the graphic for the Housing Helper appreciation email.

Mar 2641



Margaret Morris@Andrea Martins should it come from info@ address?

Mar 264



Andrea Martins Sure.

Although some of the project boards have more detailed discussions about assigned tasks, for the most part the communication remains highly work focused and marketers produce long threads as work is done, checked, revised, checked, revised again and eventually approved. Although it is possible to chat about anything, or integrate office chat apps such as *Slack* into Monday.com, the Marketing department at Canango chooses not to. Regardless, the flavour of work communication inside the world of marketing at Canango has changed in subtle but important ways compared to life with a project manager. Some of the marketers offer examples:

Lawrence, notes the need to keep organised offline to avoid the potential for miscommunication,

I try to keep my Monday conversations pretty focused. It's kind of a utilitarian sort of thing. You just kind of um you know, just stay focused on the topic or whatever.

Each of us pretty much has control over what we allow to be posted because maybe once starting out it may have been problematic for deadlines that looked like they had been passed but conversations had already changed the deadline but Monday hadn't been updated to reflect that deadline change and then it may have looked awkward for a person. That's a problem with this kind of platform. Unless it's being rigorously maintained all the time it just doesn't reflect reality and that can be a communications issue.

Ivy echoes Lawrence's concerns over the potential for confusion,

The problem with the group chat is just, you know, everything is a long, long, long list. And so someone says, Oh, I sent you a file, and then I'm scrolling up, you know, its like, I gotta find where it is. I'm like, send me documents in teams and I can look at it there. And then I can put it in a folder, or send it to you on Monday.com. But the problem sometimes with that, though, is there are multiple versions of the file attached in the chat and you kind of don't know which version you're getting, and so on.

Although it was his idea to use platforms to manage practice in the first place, Robin too notes there are drawbacks when using them remotely:

Monday.com has improved our output. We dropped a full person, and did not drop a single project and in fact have gotten more done more on time and more effectively. However, the technologies make it more difficult to have casual

conversations and everything seems to take a tonne more time. But that's because of covid and working outside of the office. Doing everything over video conferencing, collaborating on anything, is far more difficult. Before when someone would write a piece and it wouldn't be right you could say so and check back right away and make corrections. Now it's just going back and forth way more because we're just not looking at each other. It's just a communication thing. We're not like taking the time around the watercooler to decide what's best. It's like we decide what's best at a very top level, sort of trickle down, it gets watered away. We have far more ways of being very superficially engaged than when we used to, but hardly anything actually replaces a conversation and hardly anything replaces a conversation in person.

9.5.7 Dashboards: defined by our numbers

The instrumental flavour of the world inside Canango's implementation of Monday.com is underpinned by the dashboard feature. Here we see the dashboard belonging to Shirley, one of the graphic designers (Exhibit 9-6). Once again, the project status colour scheme dominates the page, signalling the underlying assumption that completing tasks is the single most important job of everyone.

The dashboard feature's strengths lie in its clarity and simplicity, potentially increasing efficiency; however, this is only true if one uses the dashboard as intended. As Ivy notes:

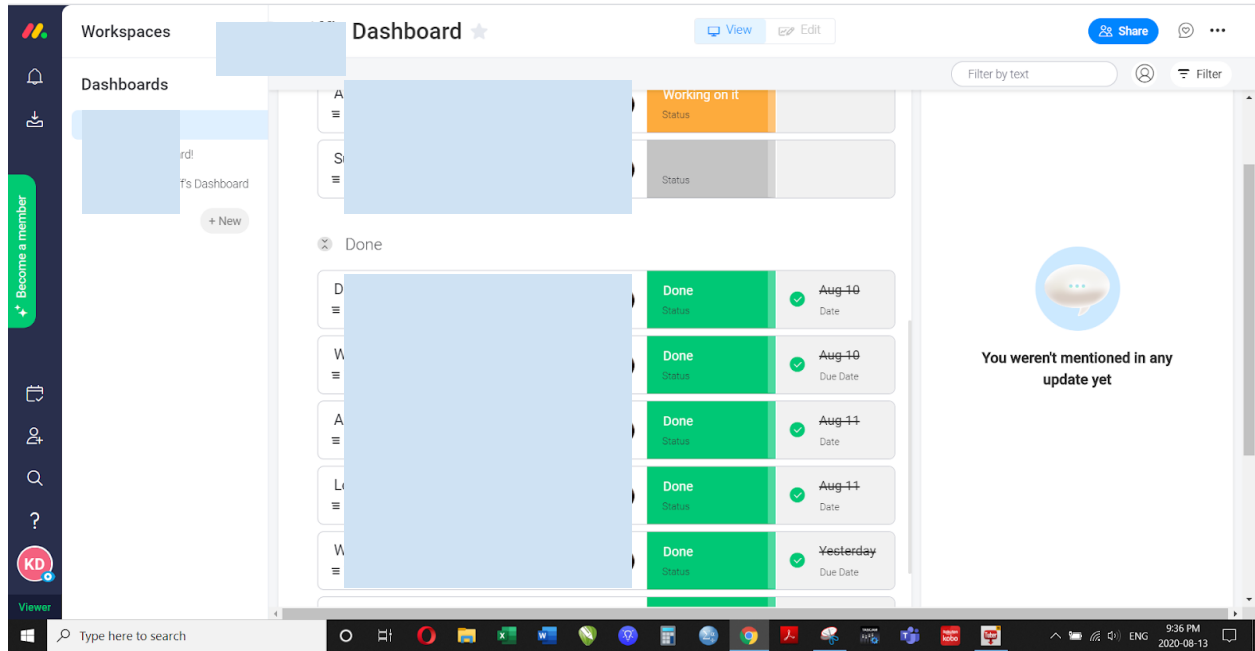


Exhibit 9-6. An example of a dashboard in Monday.com

But this also, you know, like, it's just a really good at a glance thing. I go into my dashboard and you know, check everything and see where it's at. And there's so much. So I just sometimes display something just on paper that I can keep on my desk and just kind of make notes on and then I can update it on monday.com. I feel like you know sometimes it can take more time to kind of go into the world of the future, haha.

Here Ivy is enacting her sense of self as organised and effective by stepping outside of monday.com because 'there's so much', mirroring Shirley's strategy for managing the overload in the previous clash between Agile marketing and the NGO helper practices of the program staff who kept bringing her projects without seemingly knowing, or caring, about the marketing

department's processes. Interestingly, Lawrence uses lists to keep track of things outside of the platform, as well, but for a very different reason:

Researcher: How do you make use of the dashboard to keep track of things?

Lawrence: Haha I actually keep my own analog list of everything written down. I have my own system for doing that and then I go into monday.com and then just make sure that they sync up. And I'll get these daily notifications that are waiting to get done, but I don't trust that as much, really. I don't maybe trust these new platforms as much because I mean, like, this is our third one now and, and if something goes awry or they have their own lapses then we're left without our records. [So] we'll have our meeting. And we have it on Teams, we still call it a stand up, but we're, we're all seated at desktops but we'll have our meeting and we'll talk about things and that's where I'll try to get the bulk of information to keep current.

The hierarchy obviously is spoken information first and then my written information and then I get that all into monday.com just to know that there's a digital record and all that it can be very effective to go back to it. To me that's how I do it. I keep a good list in my notebook.

To me, I think, I just sort of reflexively default to email. That's the way I grew up. It's the most authoritative app.

Perhaps aligned with Lawrence's 'curmudgeonly' side (recall his witty response in my account of the big meeting to introduce Monday.com) he is a risk manager at heart; experienced, competent, and a little cynical about grand plans, he has 'seen it all' in his many years of experience as a designer in both the traditional print world and in new media. He applies practical judgement that comes from experience. Whereas the dashboard is a site where Ivy authors a sense of order, for Lawrence, it serves as a reminder that the team needs to have a backup plan and he makes sure he has one.

In both the case of Ivy and Lawrence the paper lists are used, then 'synced' with the software platform. Once again we see the improvisational nature of world making, using the same resource with the same end goal in mind: being productive and effective, but doing so differently through non-software resources that are part of the larger day-to-day world of working in an office with traditional tools like pens and paper.

9.5.8 Bringing together the platform as a semiotic resource for world making

In summary, a number of semiotic resources with potential salience for what Agile marketing means within Monday.com were catalogued:

Artefacts:

Bright, clean design with sans serif typeface, large amounts of white space and bold colours (A design esthetic, signalling order, simplicity, efficiency, clarity and logic)

- Inbox with filtering which affords the ability to focus on messages of interest

- Widgets for tracking time, playing videos and music, viewing progress, etc. affording a high level of customization of the overall feature set and user experience of the individual user
- Customizable avatars afford the ability to present a desired image or ‘identity’ to the group
- Red, amber, and green task status colour codes which alert everyone about what (and who) is on time and and is behind schedule but not why
- Universal search tool enables quick searching of anything stored on the platform
- Weekly planning meetings (Scrums) which carry over one of the key Agile project management tools introduced by Ted, who is no longer at Canango
- Daily standups (currently held virtually in Microsoft Teams); another artefact carried over from Ted which affords the team to know what everyone is doing that day and where they fit in. It also serves as a tool for managers to hold the marketing team personally accountable as part of the standup includes routine reporting of ‘the three questions’: *‘What have you completed since the last meeting?; What do you plan to complete by the next meeting? What is getting in your way?’* (Agile Alliance, 2022)
- Numerous integrations with 3rd-party semiotic software such as MS-Word, Adobe Creative Suite, and Salesforce afford an almost unlimited semiotic potential within the digital domain
- Social media-style chat window with the ability to post text, insert multi-media, web links and documents, as well as tag people and other entities who have access to the system affording continuous instant communication
- Personal dashboards with KPIs and project statuses, ‘mentions’ by other team members,

due dates and colour coded task statuses producing pressure to perform and a sense of how one compares to others

- Multiple user selectable project views including timelines, Gantt charts with dependencies, and Kanban boards affording easy at-a-glance understanding of what projects are underway and what their status is relative to deadlines
- Onboarding content that uses start-up vocabulary and software development vocabulary (E.g 'use cases', dependencies, standups, scrum, burndown charts, etc) and features young knowledge workers in trendy settings which provides supplied identities of the smart attractive fun hard working neo-liberal worker
- High level of customization which coincides with the Agile ethos of flexibility and empowerment

After conducting a negative analysis, I also note the following omissions:

- Central project manager (marketers now have agency to manage more of their own time)
- Physical Kanban board (One must deliberately open the Kanban view; it is no longer continuously visible to all people in the marketing department)
- Integrated video and audio conferencing feature (handled through integrations such as Zoom and Slack)
- Anonymity (one is forced to be transparent by virtue of the feature set, how it is controlled by Andrea and the requirement that everyone use the software in order for it to 'work').
- The ability to gather physically around the water cooler and figure things out and use spatial artefacts in a shared environment

We thus see numerous artefacts with various meaning potentials; however, the range of ways in which they could be used is constrained by the inherent design and limitations of the software medium, *per se*. A software feature cannot generally be used in unintended ways except in special cases (e.g. using e-mail programs as personal organising and reminder tools). In Monday.com, the software uses amber, green, and red to symbolise task statuses and one does not have licence to assign different meanings to these colours in the context in which they are used (e.g. assigning green to projects that relate to plants. Neither can software be physically manipulated and transformed, like material resources (Van Leeuwen and Djonov, 2017).

Whereas leather can be made into a pair of shoes, and a pair of leather shoes could in turn be cut up and made into keytags, software cannot be changed into anything else. And where one may use Monday.com to keep track of tasks, unlike a to-do list written on a piece of A4 paper, it cannot be made into a paper aeroplane to be used for symbolic acts of play in the office or classroom. The power to manipulate the resource resides with the holder of the intellectual property rights and the programmers they hire.

Most significantly, however, agency is negatively constrained while affording certain kinds of actions. People can decide *when and how* to take up a task but not *whether* they are going to work on it. As Robin notes, the nattering and bickering about work is gone because as with Kanban, everyone is visible and shirking is impossible to hide.

9.5.9 Monday.com as social practice

I next apply Van Leeuwen's framework for analysing social practices introduced in Chapters 7 and 8; however, so as to better align with the structural aspects of figured worlds and afford a more complete analysis, I also include van Leeuwen's (2005) concept of semiotic (normative) regimes which 'regulate the use of semiotic resources. Van Leeuwen (2005, 2008) addresses several kinds, including codification (explicit rules), tradition (implicit rules), expertise, role models, and technology, that all structure production and interpretation of meaning' (Poulsen & Kvåle, 2018, p. 703), several of which are integral to the way marketing inside Monday.com 'works'. Additionally, due to the importance of positionality in the concept of figured worlds (Holland et al. 1998), I also add it to Van Leeuwen's (2008) framework so as to explicitly map key changes in status or rank which were instituted or emerged as a result of the construction of each world in the study.

Enhancing Van Leeuwen's (2008) framework with the inclusion of positionality thus provides a systematic way to attend not only to the semiotic resources available to the participants of a figured world but also how these resources work to create new practices which are themselves artefacts in the figured world, a process that moves beyond reducing semiotic resources to 'discourse' contained in 'texts'.

By way of review, as the components of practice change in different situations they serve to transform worlds as they are drawn upon improvisationally and used by participants as mediators with their own affordances, serving to build social identities, relationships, and realities, including shifts in power and status (Holland et al., 1998). Table 8-2 in the last chapter provides

a sketch of the components of practice and how they changed as Canango moved from its earlier 'NGO helper' figured world to the figured worlds of 'Agile marketing'. I now continue by tracing changes which happened along with the shift to Monday.com (Table 9-1). The components of practice are colour coded according to the figured world where each originates, (e.g. items under the 'NGO Helper' world are blue, while components in the Agile marketing and Monday.com worlds are green and red, respectively), allowing one to see how components change through their transformations, and how in some cases, carry forward or make a return in new figured worlds as they are being made over time.

9.5.9.1 Mapping transformation

Mapping the transformations across the three 'worlds' reveals several themes: *helping again*; *social pressure*; *no project manager*; *the illusion of choice*; and *atomization*. I will look at examples of each, in turn.

9.5.9.2 Helping again

The greatest amount of change occurred over the shift from the 'NGO Helper' world (items in blue type in Table 9-1) to the 'Agile marketing' world (items in green type in Table 9-1). Something was added, deleted, substituted, or rearranged in the case of every component of the framework, as in the shift from a world in which everyone had a hand in every project to one based on role specialisation and individual accountability.

A significant amount of transformation also occurred in moving from the Agile with manager world to the world of 'Monday marketing' (red type); however, many essential components were

carried forward unchanged or rearranged (green type). For example, work timing is still based on strategic planning, rather than on a first come first serve basis and directed by program managers, as was the case in the NGO helper world; however, several artefacts from the NGO helper world made a full or partial return in the Monday marketing world (blue type). For example, creative leads once again are able to meet directly with program managers to discuss projects, rather than getting direction second hand through a marketing project manager, as in the Agile marketing world; however, this is not a direct consequence of the software, rather than with the team no longer having a central project manager, which is at least partially facilitated by the software. In other words, using Monday.com is not a necessary condition for a return of creative leads to meet with program managers directly but the permission of senior managers is, as provided by Robin in the meeting in which he introduced Monday.com, related above.

9.5.9.3 Social pressure

A number of the changes can be seen to evidence how social pressure is built into the design of the platform. Monday marketing is more transparent than Agile marketing with the introduction of project 'boards' which may be viewed by everyone and acted upon by members invited to participate on that project by the creative director. As already noted, these projects all have visible deadlines and progress metering, building a narrative of urgency as the projects progress. Most obviously, the platform introduces the green, amber, red colour coding scheme to designate task status, which has the potential to also encode individuals with the quality of always being stuck (many red blocks beside their avatar) or being highly productive (many amber and green blocks). Finally, Monday.com marketing affords the ability for invited program managers to see

certain aspects of the work but not the ability to make changes, allowing the marketing department to maintain control over the progress of the work.

9.5.9.4 No project manager

One of the most significant changes has been the lack of a dedicated project manager. As Lawrence indicates:

I would say with Ted leaving that's probably had more of an impact on my work. Ted is no longer shepherding projects. There's no longer a dedicated staffer paying attention to all the details of every project. And Ted used to deal with people coming down randomly from other departments which did save time when we were up against deadlines but then again I like meeting directly with clients. It's what I do, right? I like to help people with their communications projects. That's my role and helping them is kind of who I am.

We thus see how the move to 'Monday.com marketing' re-opened a space of authoring for Lawrence to do 'what he does', though not as a result of the software, per se, rather with shifts in practice around its use.

A side effect of the transparency and status metering is that workers can see 'where things are at' and thus have the ability to 'jump on' a task to assist if they have finished their assigned tasks early and they see someone else is stuck or behind schedule. This task switching and sharing is a fundamental principle of Agile methods and Monday enables this without the need for a

dedicated project manager to assign and reassign people on the fly as individuals are expected to assist where and when needed.

9.5.9.5 The illusion of choice

Monday.com offers functional flexibility. For example:

- Under the component of practice, *actors*, a key addition is the introduction of algorithmic agents within Monday.com which automate certain tasks such as notifications across the team based on events, taking the place of the dedicated project manager. Although Canago makes minimal use of these automation features at the time of this writing, the potential exists for extensive automation of marketing workflows which would relieve marketers of certain technical project management functions such as scheduling campaigns and responding to enquiries and so forth.
- Monday.com offers a large library of templates for different types of business and projects. Although there is the potential to structure a team's and individual's thinking around 'how things should work' through the way that the software designers think practice should transpire, all templates and board layouts are fully customizable, allowing Canago marketers to revise the boards as they see fit.
- Monday.com affords the ability to integrate applications such as Word and Adobe Creative Suite into the platform so teams could collaboratively edit creative content; however, Canago workers do not do this in practice, and different applications are used independently with some workers preferring to use traditional e-mail and phone calls to communicate, or Microsoft Teams for video meetings such as the daily virtual standups. The result is a continued siloing of communication and selective avoidance of

transparency and surveillance. A consequence is that in practice Monday marketing sometimes leads to more *inefficiency* and uncertainty about where certain pieces of content, or different versions of content reside in the system, compared to Agile marketing.

Further observations falling under the theme of no project manager related to deletions and rearrangements across practices/worlds

- Deletions were composed of a project management position, the physical Kanban board, Freedcamp project management software, and Microsoft Project software
- Rearrangements included senior creative staff regaining direct access to program managers for discussions about marketing communications, as well as the ability to conduct work remotely via the chat function and the parallel use of Microsoft Teams for virtual meetings. Before Covid-19 nobody was authorised to work from home except in rare instances during the yearly annual report production cycle, when limited overtime was necessary to meet deadlines.

Each of these examples displays a paradox. Although the platform enables wide flexibility with respect to taking action on work and projects, it prohibits inaction and anonymity. Everyone must participate as intended or the system does not work. That said, workers are now atomized as seen in the next several examples.

9.5.9.6 Atomization

Certain aspects of digital transformation of marketing worlds at Canango may be seen in reference to the theme of atomization. For example:

- The introduction of Agile marketing, as opposed to the NGO culture world, introduced specialisation, accountability and various tools of self regulation such as daily standups and publicly posted kanban boards. Monday.com brings these artefacts into the digital domain while sharpening the startup culture ethos to emphasise simplicity, flexibility, extreme transparency (surveillance), and measurement. The software and onboarding videos supply a rhetoric of positivity, claims about empowerment and a visual style that represents a sort of ideal of the young attractive tech-savvy start-up worker working in a trendy-non-traditional office environment, making high salaries.
- Both Agile marketing and Monday marketing introduced changes in positionality, moving from the helper position to a specialist position and back to a helper position. In the case of Sam who was once a press operator and part of the marketing team, he was repositioned in a more general operations role, requiring less technical knowledge and craft. Once again, most change occurred when moving from the NGO culture world to the Agile marketing world.
- Lastly, certain features of Monday.com, such as the chat window, are at once used to reinstate earlier practices (E.g. people in different roles providing input in each other's areas of responsibility) and under utilised (E.g. discussions are more 'to the point' than in person in the work pod and focused entirely on work). This may be due to a relative lack of privacy on the platform. In a work pod, it is possible to share opinions quietly with an individual and go off topic with little consequence thanks to masking by general office noise and the fleeting nature of verbal utterances. In the Monday chat window, everything is visible and it remains there indefinitely, leading naturally to a situation where people are perhaps more cautious about what they let out there for everyone to see, however in

interviews marketers claim that they are not particularly concerned with the amount of visibility built into the platform; rather they seem more concerned that what is visible on the platform will misrepresent reality because the information is not current or is simply absent, residing in some other application or written on a piece of paper, somewhere.

9.5.10. Captured identities

The above observations also point back to the idea of captured identities introduced in Chapter 6. There, we saw the examples of Shirley's Agile organiser identity being resemiotized in the form of a paper to-do list and Ted's identity being captured in his work pod, later occupied by Ivy and then being imputed on Ivy by program staff who assumed that Ivy was 'the new Ted' by virtue of her sitting in Ted's old spot. Such processes are brought into sharper focus when looking at work within platforms such as Monday.com.

Earlier I noted that, for the most part, the creative team keeps their communication brief and to the point; however, in the next excerpt we see how people's presentation style and traces of identity enactments are observed in a more involved exchange. What is interesting is that five different people participate in the thread; two creatives (Ivy and Lawrence), Andrea the director of communications, and Siobhan and Colleen from the events team. One gets a sense of who each person is by how they compose messages and some of the vocabulary they use.

In the following vignette the team is sorting out a rush e-mail invitation for a virtual report to the community that the fundraising team has planned for the staff of several large corporate donors. We enter the thread as Colleen asks about the delivery channel for the e-mail. Text is drawn

directly from the monday.com chat window with avatars and names of people, organisations, and events changed for privacy. Avatar substitutions use a similar style as the originals.



Colleen Davidson Question, I was under the impression this was going through outlook from Aaron Charles- has this changed from last week?

2d6



Ivy AndersonHi @Colleen Davidson, yes this has changed. Robin said there wasn't time for html, which would have been required for an RSVP button, graphics, banner, etc. in the email. I've made some edits to the EventBrite, too. Just needed a little love. All my copy's with Andrea for review so I'll send to you once she's approved and Sandra and Tina. Thanks!

2d6



Siobhan PhelpsWhere would I find the copy to build a MailChimp? is there a header or footer made already?

2d6



Ivy AndersonHey @Siobhan Phelps, just waiting on Tina to approve the copy. What specifically do you need for graphics. I sent Lawrence the draft copy so he can make the banner and a box with the infographic. Anything else?

2d6



Ivy Anderson@Siobhan Phelps @Colleen Davidson Tamara was also hoping to be able to show her volunteers in advance, so if we could do up some tests by tomorrow, that would be great. @Colleen Davidson, I'll have some edits to the EventBrite copy, too. Just waiting on Tina's approval. Tx.

2d6



Siobhan Phelps I have not seen any of the content for this email so I am not sure if it is missing anything. Once I have the text, i can make a draft. I will add the banner and infographic when I receive them from @Lawrence Saunders

2d6



Ivy Anderson I know, sorry I just completed a couple hours ago and sent to Andrea, Sandra, and Tina for approval. No...time...to...think. Aarrgh! :) Anyway, I've attached a draft @Siobhan Phelps and @Colleen Davids on of the three pieces. Ignore the event on the first page. The EventBrite and MailChimp copy follow. Hopefully Tina will comment soon. You can get started if you want and I can just send any changes in revision tracking. Whatever's easiest for you both. :)

New Business copy.ih.docx

Show fullscreen...

2d6



Andrea Martins @Lawrence Saunders is working on a graphic for this, @Siobhan Phelps. Sandra was supposed to have her list ready today but says not til EOD Thursday, so Friday would be the soonest we can send this anyway.

2d6



Colleen Davidson The Eventbrite is built , and I can add in the graphic once ready then make it live for people to approve

2d6



Andrea Martins I think we have to push this email to Tuesday. Youth in Action is more Important RN. We will still have to work quick to make this email happen for Tuesday but there'll be less chance it has 53 typos If we slow down a bit.

2d6



Andrea Martins Officially moving deadlines...

2d6



Lawrence Saunders @Andrea Martins @Ivy Anderson @Colleen Davidson @Siobhan Phelps

Drafts of graphics based on the email from Ivy.

Download all files 2d6



Andrea Martins I asked for them to be ugly and underdesigned! YOU HAVE FAILED @Lawrence Saunders

2d62



Andrea Martins I love them! @Siobhan Phelps these can be added to the email and @Colleen Davidson please let Lawrence know dimensions for Eventbrite and what he can realistically fit on the header (possible not all that text but you could embed that graphic and he could do a stripped down version with the photo and just the event title, or whatever looks good on Eventbrite.

2d61



Lawrence Saunders 😊

2d6



Ivy Anderson Amazing @Lawrence Saunders! You should be a designer!

2d61



Colleen Davidson @Lawrence Saunders 2160x1080px is Eventbrite's recommended size

2d6



Lawrence Saunders @Colleen Davidson @Andrea Martins @Ivy Anderson

Hi, Colleen. I'm not sure what size Eventbrite will display at across all platforms, so let me know if some of this content may need to go for the smaller sizes. Thanks!

2d6

CD

Colleen Davidson Thanks @Lawrence Saunders! Can you send me where the file is saved or the file itself? When I save to my desktop from here an upload to Eventbrite it appears very grainy

1d6



Ivy Anderson Hii @Siobhan Phelps @Colleen Davidson @Lawrence Saunders @Andrea Martins, Tina's approved the copy. Sandra is sending the draft copy to some of her committee but I think we can proceed with getting everything set up.

1d62



Andrea Martins @Lawrence Saunders did the Eventbrite get all sorted?

1d5



Lawrence Saunders I believe so. @Colleen Davidson , is the graphic working?

1d4

CD

Colleen Davidson Yes, graphic is working and looks great

The first thing that is clear from the vignette is the return to aspects of the NGO Helper world (blue text in Table 9.1). Five people are directly involved in the production of a single e-mail. Ivy in particular is a writer but now is involved in coordination, modifying the e-mail notification in EventBright, which is normally Colleen's job, and she comments on design.

Ivy's 'quirky creative' identity (see Chapter 6 for a discussion of this identity) comes through with a witty commenting style (e.g. *I've made some edits to the EventBrite, too. Just needed a little love; [S]orry I just completed a couple hours ago and sent to Andrea, Sandra, and Tina for approval. No...time...to...think. Aarrgh! :); Amazing @Lawrence Saunders! You should be a designer!*). Andrea, meanwhile, enacts an agile organiser identity with comments such as *'I think we have to push this email to Tuesday. Youth in Action is more Important RN. We will still have to work quick to make this email happen for Tuesday but there'll be less chance it has 53 typos If we slow down a bit'*.

Lawrence is his usual relatively quiet self, keeping his comments short and expressing his sense of humour through the use of a zipper mouth emoji, which according to emojipedia.com may mean 'my lips are sealed'. In this context, in which Ivy, Lawrence and Andrea have a comfortable familiarity with each other Lawrence is ironically chastised for 'failing' to create a 'bad' design, which of course means the opposite. Lawrence, understanding that he is actually being complimented, may modestly mean something like 'You said it, not me' as a group engages in a collective process of constructing Lawrence's identity as an expert designer who can work under tight deadlines, and more broadly his (and vicariously the department's) Agile expert identity.

1. People engage in activities and enact identities through practices, co-constructing figured worlds, as argued by Holland et al, (1998).
2. As these practices become established and stabilised for a time, they may be seen to be reflective of the identities of the people who inhabit and create the resulting figured world (Holland et al., 1998).
3. Identities may thus be figuratively ‘captured’ in the platform in the sense that elements of enacted identities, or ‘identity traces’, remain embedded in the practice even after an individual no longer participates in or inhabits a particular figured world, echoing Bakhtinian ideas of heteroglossia and dialogicality, and Holland et al.’s (1998) ideas of history in system and history in person.
4. Digital environments, such as collaboration software, are characterised by strong memory, random access and algorithmic processing
5. The identity traces which comprise one’s captured identity may now be resemiotized by the individual or by others, thereby becoming technologized, according to Jones (2016), echoing Fairclough’s (1992) idea of discourse traces and the technologization of discourse
6. Using captured identity traces in this way is analogous to Bakhtin’s (Wertsch's, 1991) idea of ventriloquation discussed in *Chapter 2*.
7. Although identities may be ventriloquated, *the process occurs inside a platform ultimately controlled by managers and third party software vendors/developers* rather than in general society. It is therefore a process that is circumscribed by the boundaries which define the interests of the owners of the platform.

I will further elaborate on these themes in the next section.

9.6 Discussion/Conclusion

The defining elements of figured worlds, including positionality, spaces of authoring, and the making of new worlds, are all present within the collaboration platform Monday.com. Different people enjoy different amounts of agency, having permissions to access certain areas or being denied access; Monday.com allows one to bring in semiotic resources from outside the platform, such as word processing or video software and enact different identities and thus change worlds improvisationally. While, on the one hand, access may be more tightly controlled by management through control panel settings, on the other different artefacts from the material world are missing, such as high powered corner offices or lowly aisle seats. Moreover, people may experience the world of Monday.com *from different geographical locations*. One need not experience positionality and role boundaries from within the office work pods, people may work remotely, thus people's experience of monday.com may be different from others' in significant ways. Working within the platform from the deck of a yacht would be qualitatively different than using the mobile app while being jostled by fellow riders on a crowded subway. Although of course on a meta level, this ability to experience the platform remotely is a commonality that is in turn experienced by everyone and not *determined* by the platform, rather by external forces, such as organisational work from home policies. While some research has shown that elements of the design of platforms can constrain people and steer them towards certain identities, for example gig work platforms engendering entrepreneurial identities (Bellesia et al., 2019) other studies have highlighted the importance of how the platform may serve as more of a facilitator,

such as how social media platforms are used in conjunction with other outside resources as part of larger identity construction processes (Morioka et al, 2016). Djonov and Van Leeuwen's (2018) arguments for software having the potential to serve as both a semiotic resource and social practice would seem to be echoed by studies such as those just cited, as well as the evidence from Canango.

The semiotic resources and social practices together serve as artefacts which define the figured world. People perform pre-existing identities within the figured world with varying degrees of success. Monday.com offers transparency but it doesn't offer privacy or the ability to try out ideas with a trusted individual before they are posted up for all the world to see. As a result, some work will be deliberately done outside of Monday.com using MS-Word, paper notebooks and the telephone. The consequence of such tactics is that the data inside the platform is incomplete and some documents are not where different team members such as Margaret expect.

Lawrence explains:

I mean I think we may be in danger of giving too much authority to the platform and then not understanding that the platform is actually maintained by us and if it's not being properly maintained then it's not going to tell the truth. When you work together in a work pod you're going to understand where things are at with a project but when you're not together and dependent on the work platform then things could become a problem.

The problem comes in when you make assumptions about how well managed the platform is and then you base decisions off of that. And that's where the garbage in garbage out comes in, because if it's obviously not as well managed then it's not doing its job as well. But then when we think that it's just because it's a digitally hosted platform that somehow it's doing things better, more efficiently, then that's when the error happens if this thing is running on its own, but it really needs human input as much as ever before.

The observations from Lawrence and Robin earlier align with the findings of other research on platforms. Anders (2016) notes,

'One extremely crucial issue is the importance of uniform adoption of the TCP [team collaboration platform] across the organization. The benefits of communication visibility and capabilities for highly synchronous communication depend on the participation and engagement of all members of the organization. Furthermore, one user noted that a lack of complete adoption would inhibit productivity by making it necessary to manage internal communication across both TCPs and e-mail or other media' (p. 253).

Anders (2016) also noted the potential for users to become overwhelmed with information and this was certainly the case with Canango's experience of the earlier platform Freedcamp; These are 'all-or-nothing' technologies and it is the same with Agile methodologies generally, as seen through the experience of Shirley and Lawrence who, ironically, deal with inconsistent use of

platforms such as Freedcamp and Monday.com by adapting ancient technologies such as handwritten lists.

On the other hand, the chat feature and the ability to share work within the chat window has opened up participation on projects outside of the formal roles that were delineated by Ted and Robin in the Agile marketing world. There has been a limited return to the NGO helper world while maintaining the key delineations established in Agile marketing. Marketers have more agency but it is circumscribed as Robin elaborates.:

The product management software doesn't work independently of human interaction. It did not replace the person. It replaced keeping track of people. It replaced the nattering and replaced the bickering. The conversations are no longer about whether you really have to do this, the conversations are now about when you do this, do it like this. Right? It's like, we don't have to follow people. People aren't being micromanaged because there isn't a person standing there saying did you get this done, because it's on the platform and people feel they have agency, when they look at their day they can decide the order or whatever.

The result for Canango is that marketers may draw on 'linking worlds' to bridge different worlds which thus afford agency not available in one world or the other (see Figure 9-1). For example Agile marketing at Canango did not allow work across role boundaries as in the NGO world; however Monday.com offers the ability to jump in and comment on issues outside of one's strictly defined role, such as writers commenting on design.

The high-level affordances and constraints built into Monday.com (see Table 9-2 at end of chapter) thus structure a world in which everyone is assumed to be ‘always on’ and a certain ‘way of being’ despite having significant flexibility in communication and semiotic integrations. Monday.com provides a new Space of authoring for Canango marketers but it is synthetic. It is a space with its own agenda and paints a figured world of efficiency and transparency but with the ultimate goal of getting more users and earning more ‘seat’ revenue and this is ‘forced’ by the requirement that everyone use the platform in order for it to deliver on its promise of increased transparency and efficiency. In so doing, Monday.com presents an idealised world of the successful start-up, affording certain types of agency; however, unless it is maintained constantly by workers it will mislead. Therefore there is really only one way to *be* inside the platform.

‘Mead speaks of “pure contact experience”, what Peirce referred to as a “secondness”. There is no way to think or plan a response, only to react...like getting hit from behind by a rock, rather than seeing it coming at you (a distance experience)’ (De Waal, 2022, Ch. 7.4). Likewise, with the transition from the NGO world to the Agile world, to the Monday.com world, there is a progression from seeing what is coming, thanks to designers and writers meeting directly with departments, to having to just react to whatever is in your inbox or chat window *right now*. This produces the ‘substrate’ in which Agile identity develops over time as habits form and identities are appropriated cognitively over time.

Seen through another lens, the way that Monday.com affords and constrains certain types of activity structures what Scollon (2001) calls ‘sites of engagement’. Sites of engagement are not ‘spaces’ separate from others; however, ‘[r]ather than saying that actions occur “in” or “at” sites

of engagement, [...] it would be more proper to say that actions occur *as sites of engagement* (Scolon, 2001 in Jones, 2005, Ch. 14). Moreover, '[t]hrough our actions we set into motion spatial and temporal *entrainments*, trajectories that determine how we strategize future actions and how we remember past ones. It follows then that time and space are never "neutral" but, rather, reflect the ideologies embedded in the actions and practices communities perform together' (Jones, 2005, Ch. 14) and thereby construct figured worlds in which identities such as the Agile organiser identity supplied and enacted by Ted are captured. This is not to say platforms such as Monday.com simply *determine* who one can be (identities in figured worlds always come about through improvisation (Holland et al., 1998), rather they shape the trajectories of our activities and thereby the practices which, over time, build up people's sense of what is considered normal, potentially without questioning the underlying assumptions and values of the designers of the platform embedded in the design. The only way to liberation is thus to engage in reflexive praxe, a subject I will address in Chapter 10.

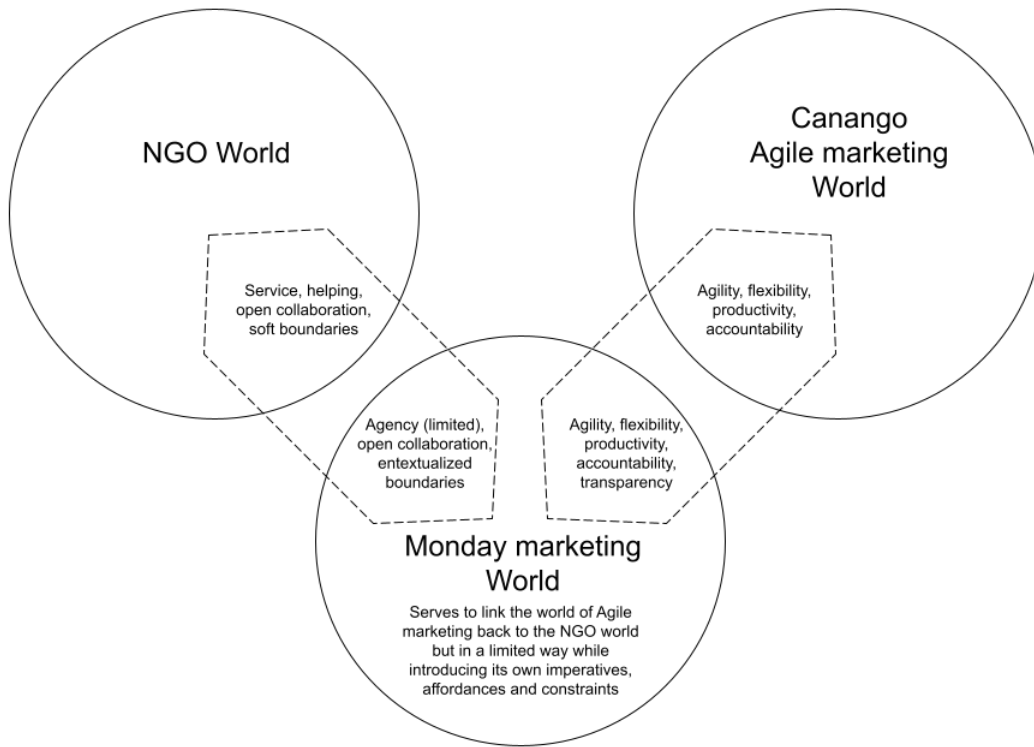


Figure 9-1. The world of ‘Monday marketing’ inside Monday.com provides a ‘synthetic’ (partial) link between the NGO world and Agile marketing worlds. The world of marketing inside Monday.com shares affordances with other worlds which do not share affordances with each other to overcome, to a certain extent, constraints on who one might be in a world.

Table 9-1. The transformation of marketing practice across figured worlds at Canango

Note: the origin of each artefact is colour coded by world with artefacts originating in the *NGO helper world* in blue, artefacts from the *Agile marketing with project manager* in green, and *Agile marketing with Monday.com* in red

| Components of Practice | NGO Helper World | Agile Marketing with Project Manager | Agile Marketing with Monday.com |
|------------------------|---|--|--|
| Actors | <ul style="list-style-type: none"> • Two copywriters • Three designers • One printer • Two event planners • Marketing director | <ul style="list-style-type: none"> • One copywriter • Two designers • Three event planners • Marketing project manager • Digital content coordinator • Director of communications • Vice president of marketing | <ul style="list-style-type: none"> • Two copywriters • Three designers • Three event planners • Digital content coordinator • Director of communications • Vice president of marketing • The software/algorithmic agents <p style="text-align: right;"><i>Continued on the next page...</i></p> |

| | | | |
|--------------------------|--|---|---|
| <p>Activities</p> | <ul style="list-style-type: none"> ● Canango departments determine their communication s needs ● They bring them to the director of communication s or an individual designer or writer ● The team works on projects in the order they are received ● Everyone has a hand in creative direction on all projects, including program staff who brought work to the department. | <ul style="list-style-type: none"> ● Senior marketing managers develop marketing communications plan with senior executive team ● Project manager and creative services manager meet with program teams to schedule repeat work, then have weekly scrum to plan near term marketing communications needs ● Project manager schedules work in Microsoft Project and Freedcamp, assigning specialised tasks to writer and designers ● Project manager monitors project by walking around the work pods and asking for updates and through daily stand-up meetings where each staff shares "what they're doing, "what they're doing next", and "where they're stuck" ● Other team members ask questions and check in on issues by talking directly over the work pod walls and through e-mail ● Project manager meets with program managers to update project progress, organising triage as deadline, needs and financial potential shifts ● Ad-hoc projects are managed with a physical Kanban board posted in an | <ul style="list-style-type: none"> ● Project needs are communicated by program managers to creative team at weekly planning meetings attended by director of communications, senior copywriter and senior designer ● Projects are assigned to writers, designers, copy editor in Monday.com on project 'boards' and creative teams take up tasks in the order they are prioritised in the software, according to timelines and colour codes ● Work questions, comments and approvals are exchanged in the platform's chat feature while daily stand-ups are administered by the director of communications via Microsoft Teams; some staff continue to use e-mail ● Chat feature affords everyone to have a hand in creative direction on all projects to which they have been assigned but only people who have been given access to the project workspace ● Task statuses are colour coded with amber for 'in progress', red for 'stuck', and green for 'complete' ● Department managers do not have access to the platform, although individual work excerpts may be shared with them from within the platform through other apps via software integrations <p style="text-align: right;"><i>Continued on the next page...</i></p> |
|--------------------------|--|---|---|

| | | | |
|---|---|---|--|
| | | area visible to entire marketing department | |
| Times | <ul style="list-style-type: none"> • Project timing driven by program departments • Work started on a mostly first come first serve basis | <ul style="list-style-type: none"> • Timing driven by strategic planning • New projects go into a queue • Work triaged by project manager based on revenue potential or relative importance of initiative to strategic plan • Ad-hoc work scheduled on Kanban board for completion as time permits | <ul style="list-style-type: none"> • Timing driven by strategic planning • New projects posted on 'boards' in the platform with visible deadlines • Work triaged by director of communications based on revenue potential or relative importance of initiative to strategic plan (however, creative staff take on tasks for multiple projects if they are free and waiting on others who are working on dependencies higher up the critical path, eliminating slack) • Mobile app permits notifications and access to project statuses 24/7 |
| Location/s, Presentation style, Performance mode | <ul style="list-style-type: none"> • In Canango offices within marketing department work area • Work is brought by program departments to marketing department • Work style is cooperative with everyone having creative input in both copy and graphic design | <ul style="list-style-type: none"> • In Canango conference rooms (meeting of project manager and program managers) • Work distributed in Agile work pods in marketing department • Kanban board posted in Agile work pod area visible to all • Marketing department adopts an 'Agile expert' ethos, advising and directing messaging and often overriding creative direction from program staff with this identity supplied and reinforced by | <ul style="list-style-type: none"> • Director of communications, senior writer and senior designer meet with program managers in Canango conference rooms or over MS-Teams from their home offices • Creative work is organised within Monday.com on project 'boards' visible to all marketing department members • Stand-up meetings happen in the various places in the Canango work pod area or virtually over MS-Teams • Writers and designers have authority to take on tasks based on what is on project boards and colour-coded task statuses • Individuals are held accountable for |

| | | | |
|------------------|---|---|---|
| | <p>ideas, regardless of role</p> <ul style="list-style-type: none"> Marketing department enacts a 'helper' or 'client pleaser' ethos doing what department staff want | <p>vice president of marketing</p> <ul style="list-style-type: none"> Work is organised in MS-Project, Freedcamp, and in paper notebooks and spreadsheets Individuals are held accountable for their performance Daily stand-up meetings happen around the project manager's desk in work pod area, with writers and designers coming to project manager and standing during meeting | <p>their performance</p> <ul style="list-style-type: none"> Project ideas are presented within the chat windows of Monday.com The Monday.com chat feature and software integrations such as for Adobe Creative Suite and Microsoft Word afford the ability for creative staff to cooperate more easily across role boundaries |
| Resources | <ul style="list-style-type: none"> Marketing director and director of communications provide guidance and direction as needed, with creative staff offering ideas across role boundaries | <ul style="list-style-type: none"> Project manager and director of communications provide direction and advice with creative staff having minimal input across role boundaries. Freedcamp software offers little in the way of tutorial material, and tips within the software, while issuing regular reminders and overdue notices | <ul style="list-style-type: none"> Extensive tutorial and onboarding videos, user forum on Monday.com website Tips on startup and in private personal dashboard within Monday.com Many pre-defined templates for different types of businesses and functional areas available, all customizable Marketing director and director of communications provide guidance and direction as needed, with creative staff offering ideas across role boundaries |
| Additions | | <ul style="list-style-type: none"> Project manager role Director of communications role One event planner Digital content coordinator | <ul style="list-style-type: none"> Transparent project management software interface One copywriter One designer Colour coding of tasks Real-time chat window |

| | | | |
|-----------------------|--|--|---|
| | | <ul style="list-style-type: none"> ● Project management software ● Physical Kanban board ● Agile triage ● Daily stand-up meetings ● Personal accountability for delivery and quality | <ul style="list-style-type: none"> ● MS-teams for virtual meetings ● Project management vocabulary (new use of terms such as 'dependencies' and 'boards') |
| Deletions | | <ul style="list-style-type: none"> ● One designer terminated due to underperformance | <ul style="list-style-type: none"> ● Project manager layer ● Physical Kanban board ● Freedcamp software ● MS-Project software |
| Substitutions | | <ul style="list-style-type: none"> ● Vice president of marketing with a senior executive role in organisation takes place of departmental marketing director ● One writer leaves due to dissatisfaction with change in work arrangements, replaced with new designer | <ul style="list-style-type: none"> ● Project boards and virtual Kanban board view within Monday.com take place of physical Kanban board |
| Rearrangements | | <ul style="list-style-type: none"> ● Printer moved out of marketing department into new role as operations manager ● Creative staff no longer meet directly with program staff ● Creative staff have clearly delineated 'expert' roles | <ul style="list-style-type: none"> ● Senior creative staff have direct access to program staff ● Work may be conducted virtually <p style="text-align: right;"><i>Continued on the next page...</i></p> |

| | | | |
|---|--|---|---|
| <p>Normative regimes and corresponding artefacts</p> | <ul style="list-style-type: none"> ● Co-operative helping ethos with group responsibility due to relatively soft boundaries between roles | <ul style="list-style-type: none"> ● Productivity ● Individual accountability ● Boundary construction due to Individual 'Agile expert' and 'Agile organiser' identities and Agile project management tools such as triage, stand-ups and Kanban boards supplied by vice president of marketing | <ul style="list-style-type: none"> ● Productivity ● Individual accountability ● Simplicity ● Flexibility ● Transparency ● Measurement ● Supplied ethos of positivity and empowerment through claims about the benefits of open task scheduling, transparency, colour coding, live chat window, reminders, newsletters and relentlessly positive help videos featuring 'tech savvy' models working in 'hip' office environments with a 'start-up' flavour (aligning with the vendor's own start-up culture) |
|---|--|---|---|

Table 9-2. High-level affordances and constraints of Monday.com

High-level affordances

One may:

- Communicate multimodally
- Communicate synchronously and asynchronously
- Use it anywhere there is internet service and a computer or mobile internet device
- Store, share, or resemiotize all content produced on the platform

High-level constraints

One cannot:

- Remain anonymous even if you do nothing in the platform as inactivity is also ‘visible’
 - Do anything that administration has not permitted in settings
 - Modify the software source code
 - Rematerialise the software itself into other forms
-

Chapter 10. Conclusion

10.1 Overview of the Thesis so far

In this Thesis I have sought to explore the changing practice of marketing through the lens of Figured Worlds (Holland et al., 1998). As a social practice theory of identity and agency, Figured Worlds opens up a way to study how marketer identities are transformed and intertwined with agency; in this case, in an NGO undergoing digital transformation of work. I began by considering some of the literature from other researchers about how digitalization has changed marketing practice (E.g. Cluely et al., 2020; Di Gregorio, et al., 2019; Quinn et al. 2016). To get my own sense of where to focus my investigation I undertook a pilot study consisting of a thematic analysis of semi-structured interview material produced with practising marketing managers in a variety of companies and non-profit organisations. This study confirmed many of the conclusions encountered in the studies listed above, namely that digitalization has led to, among other things, an increased emphasis on quantification, accountability, speed, flexibility, role specialisation and, paradoxically, an expansion of marketing work across departmental boundaries. These shifts have led some practitioners to actively consider their position as marketers and what it means to 'be' a marketer. In my own pilot study, these shifts appeared to be most pronounced in NGOs, possibly due to greater professionalisation, itself a likely result of colonisation by business vocabulary (e.g. Ted's use of words like 'clients' and 'accounts' to refer to large donors), as well as more competition for private funding among NGOs (Nunnenkamp and Ohler Kyklos, 2012). I thus elected to undertake a more detailed study within an NGO (Canango) in the midst of a transformation centred around the adoption of project management

approaches originating in the world of software development; more specifically, ways of working known as ‘Agile’.

The fieldwork at Canango produced three studies. First I looked at the variety of marketer identities in evidence at Canango and what sort of things they enabled people to do. Second I looked at how two different identities, the *Agile organiser* and the *Backdoor Rebel* were used to accomplish specific goals as they related to the old figured world of ‘NGO marketing’ and the new world of ‘Agile marketing’. Finally I looked at how the move to the use of a collaborative work software platform instead of a human project manager produced a new figured world with implications for identity work at Canango.

I will next draw together what can be said about marketer identities based on the conclusions from earlier chapters, then build out some ideas which can offer some answers to questions about marketer identities such as, What ‘are’ they? Where do they ‘come from’? How has digitalization ‘changed them’? And, where might they be headed? I will also discuss some of the implications for practice of my musings, along with the limitations of my approach.

10.2 What can be said about marketer identities?

In *Chapter 1* I noted that there has been relatively little research specifically about marketer identities. That said, what there is paints a broad landscape of change which could be seen as aligning with transformation of practice intertwined with shifting figured worlds; from moves away from creativity toward facilitation (e.g. Lee and Lau, 2018; 2019) or greater collaboration

(e.g. Patwardhan et al., 2019) as well as the taking on of hybrid identities between social scientist and storyteller (e.g. Cluley, et al., 2020). Dean, Ellis and Wells (2017) also evidence some ways that marketers in the nano-tech field use their scientist identities as discursive resources to establish repertoires that enable them to achieve their marketing and selling aims as ‘scientist sellers’. Dean et al’s (2017) work also clearly illustrates the functioning of an identifiable figured world, although they do not use Figured Worlds theory in their paper.

My pilot study (*Chapter 4*) highlighted similar sorts of transformation linked to a variety of themes including *legitimacy, teams, expertise/specialisation, instrumental rationality, intensity, difference, communication, and platformization*. Marketers spoke of shifting identities away from creative to managerial (e.g. Evan, Chapter 4, this thesis) or a shift in orientation from communication to quantification constraining who one could ‘be’ in order to call oneself a marketer (e.g. Cass, Chapter 4, this thesis).

10.2.1 A new definition of marketing

Some of these examples demonstrate the normative effects of mainstream academic and popular definitions of marketing itself. Various definitions such as those published by Kotler, ‘*Marketing is the set of human activities directed at facilitating and consummating exchanges*’ (1972, in Baker, 2016, p. 8), or the Chartered institute of Marketing, ‘*Marketing is the management process responsible for identifying, anticipating and satisfying customer requirements profitably*’ (2007 in Baker, 2016, p. 8) point to a figured world which understands marketing as fundamentally rooted in economics. However, economics is not a sufficient perspective to

understand or explain all social activity that now falls under the purview of marketing (Varey, 2016).

Using a Figured Worlds lens shifts one's perspective, letting one attend to the multitude of artefacts which make up all the figured worlds and identities in which, and through which, marketing is practised. It also lets one consider a new definition of marketing grounded in Figured Worlds theory which bypasses language about exchange, transaction, or money to thus include alternative social and organisational arrangements. Simply put, markets are a type of 'happening' underpinned by imagination, i.e. they are figured worlds. Participants, whether marketers or the targets of marketing activity, wish for desired outcomes within the context of figured worlds which *may*, but do not necessarily have to, include markets in the classical economic sense. To be a market participant is, to very broadly speaking, use agency (such as it may be available) in pursuit of a goal.

Therefore, I suggest the following definition of 'marketing' as more inclusive and therefore realistic:

Marketing is defined as the cultivation, activation, and facilitation of the agency of certain kinds of people toward desired ends.

Given that this thesis sees 'certain kinds of people' existing only with reference to the various figured worlds by which they both constitute and are constituted, marketing is thus about directing agency within identifiable figured worlds, whatever sort they may be, whether for-profit, NGO, public sector, political party, or the practice of personal branding inside or

outside organisations. Therefore it follows that there is an identity component to marketing, irrespective of the orientation of participants, whether as ‘buyers’ or ‘sellers’, that is tied to action. Moreover, as a figured world itself, within the practice of marketing, people are positioned, they have varying degrees of agency and the worlds they inhabit are made and remade by participants through activity. These ideas obviously need further development; however, for now I present them as one possible imaginary ‘as if’ realm that readers may occupy in their minds, as they consider the rest of the ideas in this chapter.

10.3 Where do marketer identities ‘come from’?

In line with my definition of marketing, I see marketing identities as originating in practice and the activities and artefacts which construct those practices within the figured worlds to which they relate. Given the sociocultural origins of figured worlds, marketer identities can thus arise from a number of sources, including often the small, mundane, activities of which marketing practices are constructed. I identified some of these identity categories in Chapter 6, including: managerially supplied, emergent, performed, socially afforded, and technologically afforded (see a longer list below). These identities in practice may be taken up and appropriated by people and they may be contested and resisted. Sometimes they may be structured and ‘captured’ so as to be used as semiotic resources by others or imputed on others, regardless of whether individuals appropriate them cognitively to any great extent. In other words, looking at these sorts of identities through a Pragmatist lens, specifically James’ perspective (1907), if they are displayed and performed by marketers and ‘seen’ by other people within an organisation who then act toward them *as if* those identities were appropriated by the marketers then, for all intents and purposes, *those identities are in the organisation* and they may be used in various ways as tools

to effect agency. This speaks to both the existence of identities as a matter of degree (See Cooren, 2018; 2020 on materialisation) as well as originating partially through specific activity such as interaction. Identities may thus be seen to be shaped and constructed not only through routines but also through improvisation in response to phenomena and change, using the resources at hand (Holland et al. 1998). I evidenced this by developing a 5-element heuristic framework composed of *'matter'*, *meaning*, *mediators*, *'me'*, and *motion* then using it to analyse how Ted, Shirley and Sam used various supplied and emergent identities in order to get certain things done. For example, the Agile organiser supplied identity is defined by a world which assumes that work should be undertaken in a highly systematic way that also allows for improvisation within a rules-based framework. This framework provides the mediational means to construct, perform and deploy identities, a process Holland et al call 'symbolic bootstrapping' (1998, p. 38) whereby 'humans manage their own behavior through signs directed at themselves' (recall Shirley's and Lawrence's paper lists) even though there is no guarantee the process will be successful (Holland et al., 1998, p. 281).

Identities may thus be modified and transformed over time in the face of change, such as that imposed by processes of digital transformation, whether the appropriation of identities supplied by managers or emergent ones arising from resistance.

10.3.1 Kinds of marketer identities

I next evidenced a range of different marketer identities across a number of industries and organisations, as well as within my main case study site, tied to what people do, or not. Some of these included:

Emergent identities such as

- The Responsive Marketer who just ‘does what people need’ (e.g. Jules, see Page 109)
- The Numbers Person ‘who can’t call [herself] a marketer unless [she] knows her numbers’ (e.g. Cass, see Page 111)
- The Reluctant Specialist who used to ‘do it all’ but must now frustratingly focus on management because the creative skills have become too specialised (e.g. Evan, *It just kept evolving and escalating to a point where at one time I was able to do everything photography, writing website construction, to a place where again it became very specialised.* Page 113)
- The Reluctant Generalist who can’t get the attention of creative staff overly focused on major clients so must engage in creative work for which he does not feel qualified (e.g. Jules, *I’m not a writer. I’m not a designer. And she told me to whom we’re trying to send the email [but] am I supposed to design that?* Page 109).
- The Internal Consultant who serves her organisation by drawing on expert marketing resources and new technology to make things happen (e.g. Connie, *I can then use [specialists] as a mentor or consultant for things that I need to do in my day to day work. I’ll say at this point, also, I really appreciate automation. I know just being introduced to HubSpot it’s just become a lot easier in connecting with our customers on a more frequent basis.* Page 117)
- The Backdoor Rebel (e.g. Sam *If they bring it to the marketing department like you’re supposed to they say no we have to do these, these, these, these, first. But they brought it to me when the marketing department was on their lunch break.* Page 159)

- The Longsuffering Marketer (e.g. Miriam, *Eventually Miriam looks at Robin and sighs loudly, flopping her dead down toward her chest. Everyone laughs and the group moves on [...].* Page 156)

Managerially supplied identities such as

- The Agile Expert (e.g. Ivy, *We have experts. Let's use Ivy's idea.* Page 152)
- The Agile organiser (e.g. Ted, *We drop everything and move their projects to the front of the queue so for those projects we definitely do Agile.* Page 219)

Technologically afforded identities, for example

- The Software Warrior (e.g. Shirley, *I triage everything myself in a paper list because I hate Freedcamp [...] I think it's okay for Ted but it's not great for me.* Page 213)

Socially afforded identities such as

- The Culturally Sensitive Marketer (e.g. Andrea, *We need an elder [...] who is part of the program in some way. We can't just 'rent' an elder and put them in front of an audience.* Page 165)

Performed identities

- The Empathetic Marketing Manager (e.g. Robin, *His tone of voice is gentle, he adopts a half-smile and tilts his head slightly to the side while listening and occasionally winces in solidarity.* Page 156)

10.3.2 How should marketers ‘be’?

Ultimately all of these categorizations are underpinned by certain, sometimes contradictory, assumptions arising from the intersection of competing figured worlds about what is, or at least ‘should’ be, considered normal with respect to the practice of marketing among marketers and non-marketers at Canango.

- Marketers should be organised and productive [E.g. Robin: *‘We’re not their agency. How much would we charge them for this? We’re organised! Now they need to get organised upstairs and figure out what they want to do’.*]
- Marketers should have special expertise which should be demonstrated and valued [E.g. Robin: *‘We are the ones taking the risk with our time yet they need us to bail them out. They have no idea how to structure event promos [...] They’re burning everybody out and we’re going to have to save their bacon again’.*]
- Responsible marketers should be culturally sensitive [E.g. Colleen: *I don’t think we should have the banquet at Longhouse (A meeting hall at an Indigenous community services organisation) because it highlights the disparity with people who walk in off the street and drink coffee out of Styrofoam cups, so let’s have it at the Civic Hall instead.*]
- Marketing managers should be understanding of those under their supervision [E.g. Researcher fieldnotes: *All the while Robin is exhibiting signals that he’s listening...lots of “M-hmm..yeah..yeah...that’s frustrating”, “What are your most pressing concerns right now?”.... His tone of voice is gentle, he adopts a half-smile and tilts his head slightly to the side while listening and occasionally winces in solidarity.*]

- Marketers should be given respect by people in other departments or by senior executives [E.g. Robin: *That poster was 75-percent done and young entrepreneurs wanted to change it again. Miriam: They don't respect our deadlines. It's creating significant tension.*]
- Marketing performance should be measured and optimised [E.g. Ted: *'We are probably 65% known planned cyclical work and now 35% custom. [...] When I started here, we were probably closer to 90%, scheduled, cyclical work and 10% unexpected and that's been shifting massively. And not only has that been shifting in the ratio, but the number of projects that we deliver [...] is growing. I've seen that in some of the data I've had in the various tools I've built over the years'*]
- Marketers should meet the needs of all departments equally rather than making people wait [E.g. Sam: *Now they're supposed to go through marketing and then it gets to me[...]But if that went through the marketing department, they say no, we need to do these, these, and these first [...] I try not to make people wait. Everybody's job is important.*]
- Marketers should be flexible and do what their clients want [E.g. Ted: *For us we still have to plan some things in advance but with our custom accounts, growth accounts and enhanced accounts, we do everything they want us to do, when they want it. We drop everything and move their projects to the front of the queue so for those projects we definitely do agile since they are improvised and revised as we go.]*
- Clients don't know what they want/are doing [E.g. researcher field notes: Robin stated that the fundraising team was behind on numbers and starting to panic and taking a 'spray and pray' approach so the marketing department would have to be ready to 'buckle down' and in effect, 'rescue' the fundraisers.]

- Clients should know how the system works and not make unexpected demands on the marketing department [E.g. Shirley: *It would be nice if our internal clients knew our process. If it goes to another department it doesn't really work [because] you can only work when everyone understands the processes.*]
- Marketers should be in charge of making marketing plans and prioritising projects [E.g. Shirley: *I think people are used to just like, I'll just go down there and say, can you make me this thing? They don't realise that, we have a list of things that are prioritised and like this thing you need three months from now is not. It's like I feel like we try to plan everything well in advance in our department and then all these things come in at the last minute.*]
- Marketers should embrace the latest digital technologies and methods (E.g. Robin: *'Canango needs digital. It needs to get more on the cutting edge of everything. So it's like what makes a marketing team good is the ability to talk to donors where they are, to talk to your customers wherever they are, and be relevant in the conversation. That is, to me, being in a digital space, being able to use digital tools [...]'.*
- Marketers should be cautious in their embrace of the latest technologies (E.g. Lawrence: *'I don't maybe trust these new platforms as much because I mean, like, this is our third one now and, and if something goes awry or they have their own lapses then we're left without our records'.*

As above, specific assumptions and understandings underpin individual figured worlds (Gee, 2014a). As we have also seen in earlier chapters, as figured worlds change, identities also change

and may be used in new and different ways, which brings me to one of the key questions addressed by this thesis.

10.4 How does digitalization change marketer identities?

As marketer identities are interwoven with various narrower figured worlds such as Agile marketing, digital marketing, and others seen in this thesis, identities may potentially change along with changes in the various practices and artefacts which define these figured worlds and the master figured world of marketing. My study also adapted Van Leeuwen's (2008) framework for mapping changes in social practice, including potential changes in eligibility conditions (See my analysis of Ted's Kanban board) as a way to trace the transformation of figured worlds and, potentially thereby, identities.

At the beginning of this chapter I reiterated studies that trace some of the shifts in marketer identities that have taken place around the world in the face of digital transformation. A common theme running through them is that changes in practice and what is considered normal lead to changes in people's expectations which set up situations which in turn lead to processes of improvisation. This was best exemplified by people such as Sam at Canango in my main case study as well as people like Jules at the events management company featured in my pilot study. In these examples we saw people faced with redefinitions of their work due to change from elsewhere in the organisation who then enacted identities which they used to define themselves as 'doing everything for everybody' (Sam) and 'just giving them what they want' in the case of Jules. In a more general sense, however, these examples of digital transformation illustrate

potential changes in the spaces of authoring in which marketers are able to use agency and author, enact, and use identities, which leads to the next section.

10.5 How may marketers use identities?

Jones notes that identities are like both ‘particle and wave’ in that they may be both ‘brought about’ (identities which I have broadly called emergent identities) or ‘brought along’ (2016, Ch. 6). Jones notes, however, that before identities may be used in practice they have to both be available to the person who wishes to use them – social practices have eligibility conditions (Van Leeuwen, 2008) – and they need a way by which they may be ‘invoked’, qualities which together produce what Gee calls an ‘identity kit’ (2014a in Jones, 2016, Ch. 6). I have suggested that identity kits are assembled from artefacts made available in figured worlds and it is such identity kits which are the more specific combination of artefacts and assumptions that people actually ‘use’ when they use identities. In other words, ‘[p]erforming social identities involves deploying multiple tools in a particular identity kit together in ways that ‘work’ in particular social circumstances’ (Jones, 2016, Ch. 6), processes which parallel the improvisation emphasised by Holland et al (1998).

In Chapters 7 and 8 I developed a framework to systematically look at how marketers use identities as resources to get things done. I then applied the framework to analyse empirical material from my Canango fieldwork, exploring how Ted used artefacts from within the figured world of Agile marketing to structure the work of the marketing department and impute an Agile organiser identity on other members of the marketing team and position the department. I also

looked at how Shirley improvised the use of resources such as paper to-do lists to accomplish marketing work within the world of Agile marketing but through the bypassing of the normal tools such as Freedcamp group work software. Finally I looked at how Sam expressed and cultivated a backdoor rebel identity distinct from the Agile organiser identity to achieve his understanding of how things should work in a world where all projects are important, not just the ones the marketing department thinks are important. In Chapter 9 I investigated how the introduction of a new collaborative work platform, after Ted left for another organisation, further transformed the nature of marketing work at Canango and what the implications were for how people may be able to use identities going forward. The changes shown in Chapter 9, using Van Leeuwen's (2008) framework for conducting social practice analyses, combined with the application of the 5-M framework in Chapter 8 helped me to document, as well as conceptualise, a variety of specific strategies and tactics which people might deploy to use identities. The following list (and relevant examples from my study) provide a summary of some (but not all) possible ways to 'use' identities:

- *Entextualisation* and deployment of entextualised identities e.g. names on kanban board
- *Resemiotization* of mediational means e.g. converting a work assignment meeting into a kanban board, i.e. choosing resemiotizations that have different eligibility conditions; conditions which again change with the introduction of Monday.com.
- *Personification* (dramaturgically assembling and presenting relevant semiotic resources aligned with a figured world, what discourse analysts might call the use of various discursive repertoires) e.g. the empathetic manager and the back door rebel; deploying various discursive resources and vocabulary

- *Regimentation* (application of normative regimes such as the implementation of daily stand-up meetings to enforce individual accountability, impute Agile organiser identity, as well as assert project manager role identity)
- *Amplification* (deploying multiple resources simultaneously across modes...enlarging existence through the addition of more and more artefacts, e.g. live streaming a meeting across the organisation or making a clever comment in a group chat application visible to everyone, rather than a private email or message)
- *Modification* (modification of figurations or normative regimes through additions, deletions, substitutions, and rearrangements (e.g. re-ordering).
- *By bringing figured worlds up against each other* to force a response, cause friction or circumvent norms in one figured world versus another (e.g. the backdoor rebel)
- *By improvising the use of artefacts* within figured worlds (e.g. by using printer's solvent as a reminder for nostalgia to reinforce 'ink monkey' identity rather than as a cleaning solvent on a now nonexistent offset press (Sam). A form of resemiotization. Or a piece of paper becoming a to-do list to escape software stress and feel capable and organised as much as a practical aid to memory (e.g. Shirley and Lawrence).

In the case of many of these approaches, people use 'their own' figured identities in ways that we might conventionally understand them, such as using them as a resource to motivate or constrain certain actions. For example, the NGO helper Figured world/identity was used by Margaret in Chapter 9 as a red flag *'We are client pleasers here, we try to bend over backwards. Whoever needs something, we want to get it for them. But nobody would take the 10,000 foot view. How is this serving our department? It wasn't serving our department. It was swamping our department.'*

Things were going out with typos. There was no process.’, whereas for Sam in Chapter 8 it was a motivator, *‘I’m the guy that does everything and anything for anybody...[for] ALL the different departments [...] I just take over and do what I gotta do. If you need it, I supply it. I try not to make people wait. Everybody’s job is important...’* In the case of other approaches, however, they also permit the use of potentially *any* identity as a semiotic resource, whether one’s ‘own’ or ‘someone else’s’. Performed identities may of course be fake and acted out as personas to position oneself or others (Coupland and Spedale, 2020, Ch. 51; Tracy and Town, 2020, Ch. 24); identities may be contextualised and resemiotized on Kanban boards and collaboration work platforms, or captured by physical office layouts then imputed on others because of where they happen to sit in a building (e.g. Robin in Chapter 6 motivating his team to be Agile organisers and not be controlled by ‘upstairs’). These tools motivate, they cause bonding, they mediate activity and they unlock or close off potential spaces of authoring by working on eligibility conditions (e.g. only people on the kanban board can take work tickets and only creatives are on it) and the various affordances and constraints supplied by artefacts in the figured world.

Ultimately, however, new worlds and identities are constructed improvisationally (Holland et al., 1998), whether through the various ‘tactics’ listed above or otherwise and, as we have seen in Chapter 9, overlapping worlds may have shared artefacts which bridge worlds and may be used in the construction of new worlds (See Figure 10-1, below)

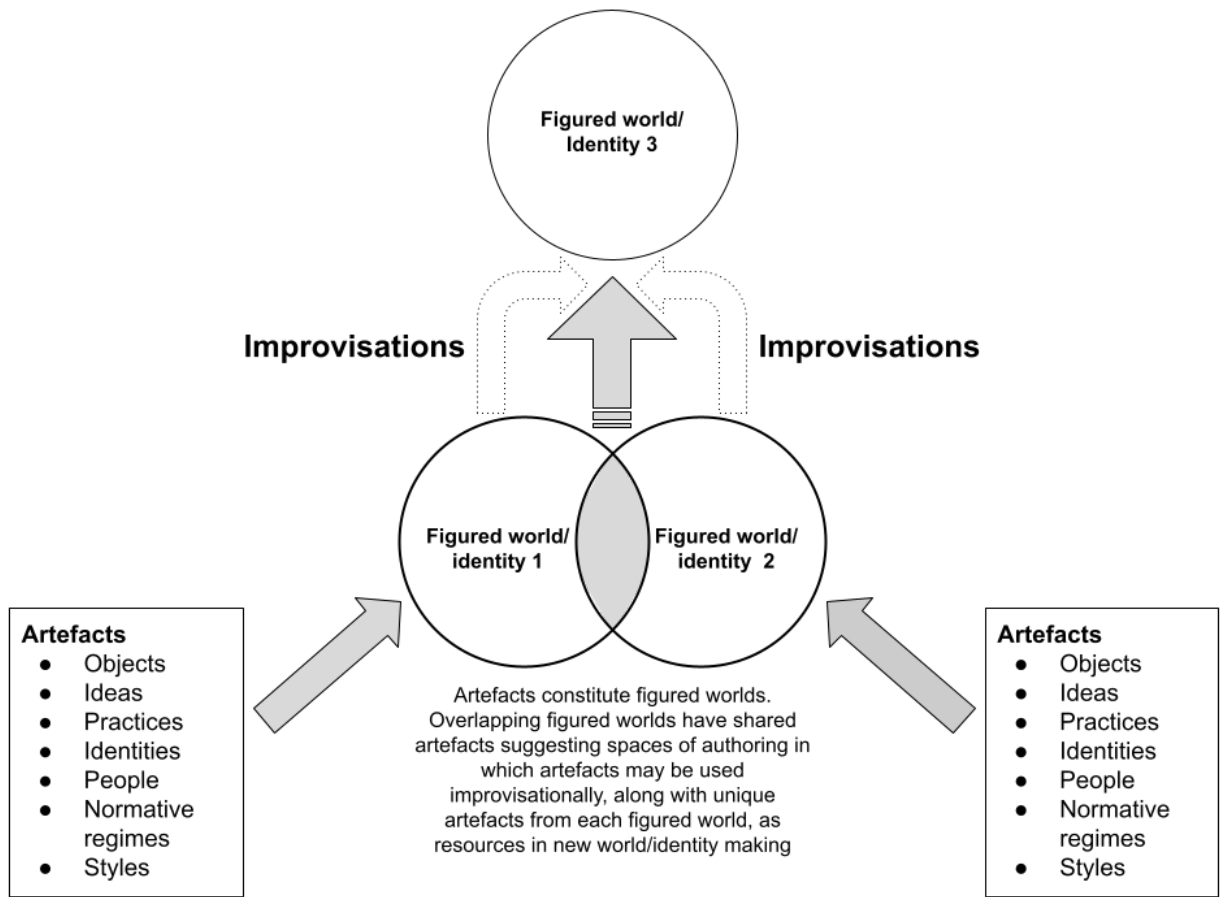


Figure 10-1. How overlapping worlds with shared artefacts may offer spaces of authoring in the improvisational construction of new worlds/identities

10.6 Where might marketer identities be headed? (From digitalization to digitization)

To recap, in this thesis I have explored a variety of marketer identities in organisations undergoing digital transformation. These various identities may be understood in relation to a proposed new definition of marketing practice that is better able to accommodate the real world variety of activity and roles now falling under the umbrella of marketing. We have also seen how marketers use available identities within figured worlds to accomplish various goals or tasks,

extending mainstream definitions of identity work. Next I wish to speculate on where marketing identities may be headed in the future, what the implications of such potential change might mean for practice and what researchers may wish to focus on in future studies.

10.6.1 Transformation through resemiotization

Earlier we saw how resemiotization, one of the processes of entextualization, played a role in helping Ted to accomplish his Agile organiser identity, impute such identities on the creatives on the Canango marketing team and, as a result, help Robin to position the marketing department as a department comprised of experts.

Transformation through entextualization and resemiotization is likely to play an even bigger role in future marketer identity work. Di Gregorio et al. (2019) reviewed possible employability skills requirements for marketing graduates, conducting a content analysis of job ads and surveying marketers in France, Germany, Italy, Spain and the United Kingdom. The authors (Di Gregorio et al., 2019) present a marketing skills framework centred on customer touchpoints linked to core marketing skills (e.g. planning, content creation, sales knowledge), customer insight skills (e.g. research methods), basic soft skills (e.g. flexibility, teamwork), analytical skills (e.g. statistical knowledge, problem solving), and digital and technical skills (e.g. social media, e-commerce, SEO). Although survey participants, broadly speaking, placed greatest importance on basic soft skills across all countries, important differences emerged based on the level of digitalization of firms, showing (perhaps unsurprisingly) the more digitalized the firm, the greater emphasis placed on digital and technical skills, along with core marketing skills (Di Gregorio et al., 2019).

Research such as the above points to a likely shift in necessary skills across the practice of marketing toward digital skills; however what Di Gregorio et al's (2019) research does not address is an important shift in marketing technology itself and what this may mean for practice and identity, namely the growth in marketing software incorporating machine learning and other types of AI. Practitioner sites such as chiefmartech.com continue to document the shifting marketing software landscape, identifying over 8,000 marketing-related applications currently available in the field as of 2020, covering the full range of practice from sentiment analysis to project management, to writing and design (Brinker, 2020). Moreover, the growth in the use of machine learning in marketing beyond applications in analytics and predictive modelling has the potential to fundamentally change the nature of different areas of marketing work that many people may have assumed would be less vulnerable to automation, such as design (Armstrong, 2021), and with it, 'how' marketers 'are'. Chapter 9 of this thesis showed how the substitution of a project manager with a group collaboration platform mediates how marketers practice and thereby build figured words and the identities with which they are intertwined; however, such shifts are potentially just the beginning. Along with these changes in the technology and skillsets will come new certifications, training programmes, and resemiotizations. This is already happening with various certifications from professional associations, such as the 'Agility in Marketing Certification' from the International Consortium for Agile (see <https://www.icagile.com/certification/agility-in-marketing>) and others.

10.6.2 Cyborg marketers and speculative futures

Beyond the use of software is the integration of software, hardware and human materiality in the form of augmented reality and ultimately the potential for a future involving 'cyborg marketers'.

Despite the temptation to view such ‘sci-fi’ futures with scepticism, such technologies are already in use including ‘smart glasses’ and other forms of wearable computers as part of the booming world of the ‘quantified self’ (Jones, 2015) and the much-hyped ‘metaverse’, after which Facebook’s parent company recently rebranded itself as ‘Meta’ (Paul, 2021). Such changes in turn lead to a variety of speculative futures which bring me back to entextualization.

Whereas digitalization is the transformation of work processes so that they are mediated by computers, the next step is to transform materiality into digital data, a process known as digitisation (Ritter and Pederson, 2020). A classic example is to scan a paper document and store it in the form of ones and zeros inside a computer storage device, where it then may be manipulated in countless ways. The same may effectively be said for marketer identities to a growing degree. In Chapter 8 we saw how the Kanban board was used to entextualise Ted and the creative team, a process not unlike digitization, in the sense that digitization is a form of entextualization according to Jones’ (2011) definition discussed in Chapter 8. In Chapter 9 we saw how Ted's Agile marketing project management practice was captured in software when Andrea set up the marketing team on the platform and was then taken up by the creatives and events team members themselves. Interestingly, however, the social practice analysis made visible certain shifts back toward the earlier NGO helper world. Although communication appeared more direct, some members returned to greater cross role involvement with writers entering conversations about design issues and vice versa. Ivy, for example, had previously mentioned that she felt that she was not as significant under Agile with project manager because her contributions would be forwarded to design by Ted and then she may never see them again

only to find out after the fact that her copy had been changed in significant ways to make it fit a new design layout while under tight deadlines.

Ivy continued to relate other ways in which platformization was related to different forms of resemiotization, using a funny cartoon avatar on Monday.com and a professional photo portrait on Microsoft Teams, performing different identities in the process. We also see this with people's ability to present different backgrounds on digital Meeting platforms such as Zoom, Teams, and Google Meet.

The growing interdisciplinary field of neuromarketing implies a future where findings from cognitive neuroscience may be operationalized via various forms of biometric scanning technology through the Internet of Things (Lim, 2018). Potential ethical concerns notwithstanding, do such technologies portend a future where marketers see themselves as possessing 'super powers' or will the possible (likely!) public backlash be as swift as the reaction to viral photos of tech blogger Robert Scoble naked in the shower wearing his prototype pair of Google glasses (Carson, 2016; Wohlsen, 2013)? Given planned augmented reality glasses by Meta and Apple in anticipation of the expansion of the so-called 'metaverse' (Heath, 2022) the jury is still out on such technologies and what they may really mean for marketing.

Scoble's Google Glass misadventure, though not without a certain level of 'creep factor', serves as a reminder about the importance of reflexivity in the practice of marketing and the cultivation of identities, as well as the truth that identities are not entirely our own. Perhaps Scoble wished to use an identity of the 'always on tech evangelist who even works in the shower' to help

promote the potential of the technology; however, other people saw the image and imputed different, less flattering identities (Carson, 2016).

Ultimately digitalization means that the work may be automated and thus everyone can be a marketer because marketing will potentially be practised the same way everywhere in most organisations. Already the vast majority of online advertising is done through Google and Facebook while Amazon with 38% of global product-related searches has become the second largest product-related search engine overall, after Google, with 78% of global internet users combined using either one of these search engines for product searches (Statista, 2022c). These platforms offer automation and AI assistance to marketers, handling deployment, analytics and even data-driven guidance on writing ads (Google, 2022). Google, in particular, thanks to its dominance in global search engine market share, over 85% as of January 2022 (Statista, 2022d), has the power to deeply shape practice. Because of the necessity of positive online reviews, advertisers are driven toward Google's rules about obtaining 5-star ratings, to word-limits, and the automatic blocking of ads which use non-standard punctuation and 'hype' in their word ads. Facebook, meanwhile, has a lengthy advertising policy which regulates everything from grammar to congruence between ad copy and website landing page content and functionality. Violating these policies may lead one to be permanently banned from advertising on the platform.

Meanwhile Robin makes interesting observations about why marketers, and his Canango colleagues more generally, should transform their practices:

‘Canango needs Digital. It needs to get more on the cutting edge of everything. So it’s like what makes a marketing team good is the ability to talk to donors where they are, to talk to your customers wherever they are, and be relevant in the conversation. That is, to me, being in a digital space, being able to use digital tools, being able to do all of that work right. That’s where our donors are. Or at least our future donors. Right? So, like right now it’s sort of a difficult transition because a lot of people don’t think about technology at all here. But what we’ve done in the past couple of years in our department is elevate the brand reach through using technology. But I will say, the other departments are three or four years behind that. They don’t even understand what’s going on’.

Much has been made about the need for marketers to develop advanced digital skills; however, I see less need for this to be the case across the practice as a whole. In fact, the most digitalized aspects of the work will be most vulnerable to automation and deskilling as the most advanced technical skills will reside even more in the vendors who develop the applications and platforms which use AI to conduct the analysis and deploy digital campaigns. What will not change is the need for creativity, originality, the ability to tell stories, the ability to organise work, and the ability to work with others from a wide range of specialist backgrounds. This will be the core requirement of marketing managers. As this thesis demonstrates, digital transformation does not happen in a vacuum, but rather at the intersection of multiple figured worlds (such as the NGO world, the Agile marketing world, and the world of Monday.com).

Ultimately though, there will always be local improvisation of identity work in the face of digital transformation, digitalization, and in particular platformization, which will continue to structure practice and therefore identities to at least a certain extent. Although platforms such as Monday.com and methodologies such as Agile marketing do allow for a certain amount of improvisation and customisation of practice, as Chapter 9 illustrates, there are clear limits which do not actually extend that far from the centre. If one chooses to use a particular group work collaboration platform built around a particular paradigm, the way one processes work will be the same regardless of the language settings chosen for the interface. The same limited number of app integrations define the limits of the combinations and permutations of apps and therefore work that may be done inside these platforms and the same general affordances and constraints will apply in every setting. An interesting question that arises of course is how do different marketers located in different figured worlds improvise their identity construction within common platforms, and as we saw at Canango, *outside* of the platform through strategies such as preparing personal offline to-do lists or logging off at certain times of the day, as Shirley does?

10.7 Implications for practise

Throughout this thesis I have discussed the improvisatory nature of marketer identities in figured worlds. This understanding is best applied through an awareness of the importance of reflexivity as a tool for attending to the figured worlds which are operative among the people in an organisation, both inside and outside marketing departments, and what the implications are for practice.

For example, marketers should first of all realise that, although it may not always seem like it, they have agency within the limits of the spaces of authoring that exist within the figured worlds that they inhabit. Although people may be positioned within figured worlds, it is nevertheless possible to change worlds and use identities semiotically as we have seen in this thesis. Being reflexive and considering the elements and artefacts which figure the various worlds they inhabit could help marketers to better understand how things work in the organisations of which they are a part and see pathways to changing their workplaces for the better. Organisations bring together many different figured worlds and consequently there are many possible points of departure for conflicting understandings of situations and for plans to go off the rails. Rather than immediately looking to lay blame for failures at the feet of individuals, team members and managers may realise that conflicting understandings and unpredictability of how people will use available artefacts to improvise in response to phenomena as they engage in identity work, and may thus come to understand the complex web of meanings that construct the worlds inside which people view what is happening around them. Perhaps reflecting on events through a figured world lens may lead to more humane work environments for people who practice marketing; a field that often suffers from intense stress and anxiety around performance and role confusion as the authors of literature going back many years attest (e.g. Goolsby, 1992; Howell, Bellenger and Wilcox, 1987).

In addition to the mental aspects of how one might deploy a Figured Worlds lens in the practice of marketing, another consideration concerns the materiality of identities in figured worlds. As Cooren (2020) argues, existence is a matter of degree. People are symbolically constituted by the materialisations associated with them. Captured identities therefore may 'live on', crystallised in

everything from past emails to former seating locations in an office, waiting to be imputed on, or used by, others. The more artefacts that are present, forming identity traces and materialising the communicative aspects of identity, the more that an identity can be said to 'be there'. Thus marketers should consider the layers of existence of the identities they deploy and enact. By increasing the concentration of artefacts and semiotic resources associated with an identity, the greater potential impact one might have with their identity. As discussed in Chapter 7, the lowly janitor in the figured world of the school, who is also the master blues guitar player in the world of the local blues scene, may attempt to instrumentalize his blues identity to achieve other goals in the school. Wearing blues music t-shirts enacts the identity to a certain degree, playing blues guitar music on his janitor's room radio adds another materialisation, bringing in his band to provide entertainment at the community school picnic materialises the janitor's blues identity further still adding to the ways his non-school identity may be brought to bear in the world of the school, perhaps to raise social capital or demonstrate capability and talent in ways unavailable to him as a school janitor, and which may translate into greater responsibility or opportunity at work.

Finally, because of the intimate nature of identity and the interconnected ways it is constructed by and between people through practice, management ethics are paramount. By changing practice and attempting to change figured worlds, you are potentially changing identities. What worlds do you wish to create? Why would you not expect resistance? Can you expect to get away with imposing new worlds without consent? People must be involved with and have a say in designing new work practices.

Each of these examples, though seen from different perspectives, demonstrate the importance of self awareness, social awareness and the ability to reflect on how the worlds of which people are a part come together in practice. Marketers do not act on their own, rather, in Bakhtinian fashion, they navigate worlds in which they borrow from what came before in dialogue with others. Reductionist, so-called, ‘best practices’ are bound to lead to unexpected consequences and when the matter at hand is something as central as identities, the potential to produce unintended misery in the workplace is great.

10. 8 Additional contributions

In addition to the above empirical and theoretical contributions, I make several practical contributions. First, I offer a heuristic framework that helps researchers systematise the study of how people deploy identities as resources for taking action and getting things done, *other than* working on identities per se as in most well-known definitions of identity work.

The ‘5-M framework’ reminds one to attend to a number of elements which broadly align with various socio-cultural theories of identity construction, including Pragmatism, multimodal discourse analysis, and of course Figured Worlds theory. The elements include: ‘*matter*’, the phenomena that make up the ‘problematic situation’, including the artefacts which make up the figures in which people understand the *meaning* of what happened, especially in terms of its likely effects. One also attends to *mediators*, the artefacts supplied by the figured worlds of which one is a part and, through which, one makes sense of and responds to the situation.

Activity within figured worlds has a constituting effect on identity, or the ‘*me*’ element, in this case the identity that people deploy to deal with the situation by using the artefacts as mediational means within the individual spaces of authoring available to them within the figured worlds of which they are a part. It is within spaces of authoring that one has agency or ‘motion’ to deploy their identities and do things improvisationally in response to the situation and, potentially, change the situation and ultimately, over time, participate in the making of new worlds. Like Van Leeuwen’s social practice analysis framework (2005; 2008) which I also deploy in this thesis, the 5-M framework provides a common theoretically grounded frame of reference with which to systematically guide one’s interpretations and make comparisons across cases.

In developing the 5-M framework I also introduce the social practice theory of identity of Figured Worlds (Holland et al. 1998) to the study of marketer identity. Other approaches to practise theory (e.g. Shatzki, 1996; 2002; 2012 in Hackley, 2020) have informed ethnographically-oriented research on marketing practice, but to my knowledge Figured Worlds theory has not been used to study marketing practice or marketer identity in particular. Figured Worlds offers a different perspective that at once bridges the agency and structure, positionality, history and improvisation that allows one to look at marketer behaviour (more later) in a holistic, rather than a naively reductionist way grounded in economism and cognitivism.

Using Figured Worlds as a base, I also applied Van Leeuwen’s (2005; 2008) and Djonov and Van Leeuwen’s (2018) template for analysing software as both a social practice and a semiotic resource to show how platforms may serve as bridges between different figured worlds and ways

of enacting marketing departments, thus showing how platforms may be seen as resources to make new worlds, rather than merely functional tools to enhance productivity.

Lastly, in this chapter I have used Figured Worlds theory to propose a way to think of marketing, not in economic terms, but rather socio-cultural terms, and thus account for the reality of marketing practice which has moved well beyond the limited confines of economic exchange to include the growth in the use of marketing practices originating in business in other areas beyond commercial firms to include NGOs, government and individuals (see more below under *Future Research*).

10.9 Limitations of this thesis

The questions of interest in this study led me to adopt an interpretivist epistemology. As such, specific claims made in view of my chosen methods hold only for my specific setting and there is no guarantee that the various ways in which Marketers use their identities at Canango will apply in every other setting; however they do evidence actual ways in which identities *were* deployed or used and one may reasonably assume other marketers in similar situations *could* act in similar ways. I have attempted to make my statements general enough so as to offer future researchers a starting point for observation that doesn't immediately render them irrelevant to other possible settings and figured worlds. That said, interpretive research does not see empirical material as 'data' in the way that positivist research does. The goal is not to capture a snapshot of 'reality' in order to work out explanatory models based on mechanistic causality; rather, interpretive logics of inquiry are interested in looking at meanings and outcomes arising as a result of people's understandings of a given situation to then develop explanations grounded in

‘constitutive causality’ (Schwartz-Shea & Yanow, 2013) which considers that phenomena arise because of the way that situations are constituted through people, processes and practices which are intertwined with the way that participants *understand the situation to be*, a situation that will never be reproduced exactly ever again and will not be the same five minutes after it emerged in the first place. I have chosen to both develop and apply structured frameworks to the study of fluid situations so that events may nevertheless be interpreted against common points of reference based on established theory.

Another limitation relates to changes brought about as a result of the Covid-19 pandemic. Although my initial empirical material came out of on-site fieldwork at Canango, by the time I conducted my follow up research, roughly three months after the team at Canango had begun to use the Monday.com platform, the entire Marketing department had begun working at home, meaning that although they continued to use Monday.com only the first several months of the transition phase took place in person in the office. It is therefore possible that the lack of face-to-face contact later could have influenced how the Canango marketers subsequently used Monday.com that would have been impossible for me to observe since I was not using the platform day-to-day in real time with the other research participants.

The pilot study, though undertaken with care, should not be construed as an attempt at a full-scale qualitative study about marketing managers’ meaning making or identity work around digital transformation or marketing practice, as it was limited to single interviews with a relatively small (n=17) purposive sample. As outlined in Chapter 5, the goal was instead to get a sense of some of the current issues and understandings about digitalization and whether they

aligned with what was in the digitalization literature. The resulting findings would then guide my selection of a main case site for an ethnographic case study to take place over six to eight months, as well as provide a starting point for where to direct my attention. That said, some of the material emerging from the pilot interviews was rather enlightening and aligned with issues which emerged from the lengthier case study fieldwork, such as quantification, flexibility, platformization, and so forth and so I have included some of it in this conclusion chapter.

Lastly, as already noted in Chapter 3, this research should be understood as having been undertaken by a middle-aged, heterosexual, cis-gendered, middle class white male entering a non-profit organisation servicing marginalized communities in inner-city locations across Canada. Some of the staff in this organisation belong to communities with less privilege in Canadian society, such as First Nations and Metis communities. Such differences may have not only coloured my own interpretations but may have impacted how others interacted with me.

10.10 Ideas for future research about marketer identities using the Figured World lens

Figured Worlds theory is virtually unknown within the marketing discipline while being an established, valid, lens for research in other fields, especially education. As such, the possibilities are wide open and Figured Worlds theory, as well as my 5-M framework combined with Van Leeuwen's (2008) social practice analysis framework might be used to revisit almost any prior qualitative study related to marketing practice and identities. One area with potential is the interface of SME marketing, entrepreneurship and identity. Although there are some studies published on these topics (e.g., Donnellon et al., 2014; Farmer et al., 2011; Watson, 2009) Fitz-Koch, et al. (2018) note calls to explore the interconnection of personal and social identities

around entrepreneurship. Wagenschwantz (2021), in particular, calls for future research on entrepreneurship and identity to incorporate environmental factors and echoes Brown (2021) in looking for research that integrates perspectives such as SIT and RT. Such a focus seems tailor made for a Figured Worlds lens given the obviousness with which one might see entrepreneurship as a figured world and the way in which my 5-M framework brings attention to histories, and integrates social, cultural and linguistic perspectives.

Naturally my framework could be applied in further longitudinal studies investigating the identity implications of digital transformation beyond the focus on an NGO setting in this thesis. Do people have different understandings in for-profit enterprises? Large enterprises? Private versus publicly traded? What figured worlds are constructed in these different marketing environments.

Additionally, Figured Worlds not only offers a perspective on identities in marketing practice but also opens up a way to redefine the practice of marketing itself beyond the limitations and naivete of definitions of marketing grounded in mainstream economics. These perspectives, far from offering an understanding of practice that encompass the full breadth and depth of the field and humanity, are instead normative and reliant on reified constructs that take for granted what marketers 'should' do and how they 'should be' as much as they produce insights about the realities of life of marketing practitioners (Varey, 2016). In my view, a non-economic view of marketing which sees marketing as practised within figured worlds, rather than 'economies', offers a more holistic way to understand marketing in terms of the only thing that actually 'moves the dial': action emerging from the agency of people in the worlds they inhabit.

As I argue that Figured Worlds can help one understand marketing as the range of activities which support people to take desired action, readers may also note some similarities to Burke's 'realistic' conception of rhetoric as, 'the use of language as a symbolic means of inducing cooperation in beings that by nature respond to symbols' (1969, p. 43); a definition that goes well beyond traditional aristotelian understandings of rhetoric as grounded in persuasion. One might say that Figured Worlds are, in a sense, manifestations of total Burkian rhetoric in action, in which artefacts, including language, symbolise how one can 'be' in a way that is understood as 'normal' by others within the same figured world. Action thus comes about because people within figured worlds engage in certain practices and symbolic activities that constitute that particular figured world, which differ from certain practices defining other figured worlds. Thus, I believe there is room to explore Burke further to see if there are more effective ways to explain or articulate the idea of figured worlds to different scholarly communities. Miles for example offers his own definition of marketing as seen through a 'sophistic' lens: *'Marketing provides intermediary services to facilitate the continuing exchange of attention and regard between firm/client and stakeholders. It seeks to manage and direct this exchange through an appreciation of the changing rational and irrational motivations of the firm and stake-holders, using these as resources for the construction of both planned and improvised persuasive interactions in agonistic environments'* (2018, Ch. 9); Although Miles' definition is compelling, it still assumes an economic basis for marketing, speaking of 'exchanges', 'clients' and 'firms'. This leaves out many forms of contemporary marketing including social marketing, political marketing, and the marketing of ideas (including misinformation) across social media platforms such as YouTube and Facebook. Burke's conception of rhetoric as based in identification aligns

better with figured worlds and thus would seem to be a good fit to explore a potential integration of the two streams of theory.

Finally, using Figured Worlds theory to study marketing practice focuses research attention on marketers themselves and what they actually do as well as what they *think* they do. This approach could help with recent calls to formally recognize a new subdomain within marketing: *marketer behaviour* (Woodall and Hiller, 2022; Woodall, et al., 2022). As Woodall and Hiller (2022) note, ‘without marketers, marketing is merely a set of concepts and techniques’ (p. 1). ‘[M]arketing becomes both theoretically and socially constructed with marketers the primary arbiters of how theories are embedded as praxis’ (Ardley and Quinn, 2014 and Palmer and Ponsonby, 2002 in Woodall and Hiller, 2022, p. 1). Marketing textbooks, in particular, assume the reasons for marketing practice is to enhance exchange processes, and these were discussed in Chapter 4, but this assumption is broad and ignores the specifics of why *marketers* engage in practice. ‘What value does the marketer derive from this involvement with marketing [...] and to what extent do [their] personal needs, or the competing pressures upon them, actually serve the needs of society and/or business’ (Woodall and Hiller, 2022, p. 2)?

Figured Worlds theory and my heuristic framework for studying how marketers use identity as a resource for agency can make a contribution to the study of questions such as those posed by Woodall and Hiller above. Ultimately, the effects of marketer behaviour touch the lives of almost every person. Marketers make not only their own worlds, they produce many of the artefacts that define the figured worlds of which all of us take part. In other words, marketers create reality, imagined or otherwise.

10.11 Summary

In this chapter I brought together the various empirical observations and conclusions arising from chapters 2 through 9, painting a portrait of the figured worlds of the NGO helper, Agile marketing, and Monday.com, explaining what marketer identities are, where they come from, and how they are used by marketers to do things. I further organised the beginnings of an inventory of the various ways in which marketers may use identities to do things. I then discussed the limitations of my research, as well as implications for practitioners. I next close with an epilogue about Andy Sellers, the marketer introduced in the prologue to this thesis.

Epilogue

Date: September 2042

Andy Sellers rolled over in bed and slowly opened his eyes. It was 7:03:24 am and the 'singula patch' embedded under the skin of his shoulder buzzed him awake at precisely the optimal time the models predicted his circadian rhythm and hormonal balance would correlate with peak physical and mental performance metrics through the workday. Although he was now approaching 80 years of age, he still had to work to maintain the middle class lifestyle to which he became accustomed back in the 2010s. The financial crashes of 2024, 2027, 2030, and 2035 had seen to that, particularly the last one brought on by the Covid-34 pandemic which was even more devastating than 2019 thanks to the federal government passing laws prohibiting lower levels of government from implementing mandatory public health measures. At least his work as a marketer was now much easier than it had been in the past, thanks to advances in martech.

As his vision came into focus the singula patch launched the augmented reality firmware embedded in the corneal implant in his right eye and he began logging product views for his current employer, Gigantica, as he looked around his bedroom. Gigantica, a Chinese company and now the biggest retailer in history since buying Amazon five years ago, paid him 3 cents every time he viewed certain products. Adidas trainers, Old Spice deodorant, LG Holobeamer; Andy smiled as he looked over at his former bookshelf which now held his collection of antique smartphones and other tech such as the iPhone 21 and Samsung Galaxy 19. Back when those

devices were new, marketing actually involved thinking up campaigns and looking at the results (by then some marketing tasks such as copywriting and deployment had been taken over by bots, but now things were fully automated) all he had to do was look at products during his day to day activities and the algorithm calculated projected demand, correcting for mental state, local weather, and 7,265 other variables monitored by the singula patch in real time. The data would be used to calculate retail prices and the wholesale price Gigantica was willing to pay its vendors. Unfortunately nobody knew which products were coded on any given day so he and all the other Gigantica marketers had to look at every product everywhere they went to make sure they didn't lose out on potential income.

As Andy opened his fridge to grab a Soylent liquid meal for breakfast he logged a few more product views and thought about his day. Thanks to his new hips and knees, and the Soylent, he was trim and mobile for his late 70s. As a result what they said about marketing being a young person's game was no longer true. He was authorised to walk two routes downtown logging views and the weather app in his eye indicated a nice day was ahead. Now to look at all of his shoes, hopefully choose the pair that was coded today, and go to work.

The Uberpod silently rolled to the curb of 240th and Main. Andy slipped out and started walking as the pod glided away, different geocoded advertising wraps appearing and disappearing on the pod's nano fibre shell as it navigated up the street. Andy had only walked a few metres when he heard a voice call his name. It sounded vaguely familiar but he couldn't quite place it. He spun around and saw an elderly woman seated next to an old fashioned easel, a street performer of

some kind. Hey Andy, let me draw your portrait, she said and smiled. Then Andy recognized her. It was his old art director from over twenty years ago at Timewarp Publishing!

'Wow, Jane. What are you doing here?'

'Hi Andy, I'm working.'

'What Do You mean?'

'I sit here and draw portraits of people.'

Andy looked at one partly finished piece on the easel, a pencil drawing of a little girl. It was amazingly detailed yet with a playful quality that suggested movement.

'How? You sell these? How do you get paid? You're not on Gigantica are you? I don't see any QR codes.'

'I get paid by Gigantica for product views, like most everyone else I know, but that isn't really my work. I draw. That's my real work. I give the portraits away.'

'You give the portraits away? Why?'

'They mean more to me that way, and they mean more to the subjects, too. There's no money exchanged. If I charged for them I would have to code them and Gigantica would get a piece. Why should they?'

Andy thought about it for a minute. Since the government did away with physical currency Gigantica had bought up all the payment networks and received revenue nearly every time

anything was bought and sold. However, he just assumed if someone worked they would want to get paid.

Jane went on, 'There's a whole movement now, you know. People doing things for others, for nothing. It's our way of sticking it to the man, hehe!'

Andy furrowed his brow before asking, 'But don't you have to buy the easel and pencils and sketch pads and everything? How's that sticking it to the man?'

'You don't get it. It's the thought that counts. I have a community. I live in a different world.'

Andy listened to Jane some more. Everything she said sounded a lot like something he read in an anthropology textbook a long time ago called figured worlds. The memory took him back to his days at Timewarp where he first met Jane...and Curtis, the UX designer.

'Say', Andy interrupted, 'Have you ever heard from Curtis? What's he doing these days?'

'Curtis? Yeah, well he went to work for that private space rocket company, Bang X, but back in 2036 after the big pandemic crash, and it looked like we were about to have a nuclear war, he volunteered to get cryogenically frozen and shot into space.'

'But didn't Bang X end up going bankrupt? How's he going to get back? Sounds like he got scammed!'

'Hehe', Jane chuckled, 'I guess he didn't know anything about people or marketing, afterall.'

Notes

1. A Web of Science search returns 188 articles containing the term ‘figured worlds’, only 1 of which was in Business and Management journals, while over 150 were found in education journals. Turning to Google Scholar, ‘figured worlds’ appears in over 900 articles in journals with the word ‘education’ in the name of the journal. Meanwhile, no articles in *Organization Studies* contain the term ‘figured worlds’ and only 6 articles contain the related term ‘cultural worlds’, used in the title of Holland et al.’s book which otherwise has over 7000 citations listed on Google Scholar.

Appendix 1.

‘Principles behind the Agile Manifesto

We follow these principles:

Our highest priority is to satisfy the customer through early and continuous delivery of valuable software.

Welcome changing requirements, even late in development. Agile processes harness change for the customer's competitive advantage.

Deliver working software frequently, from a couple of weeks to a couple of months, with a preference to the shorter timescale.

Business people and developers must work together daily throughout the project.

Build projects around motivated individuals. Give them the environment and support they need, and trust them to get the job done.

The most efficient and effective method of conveying information to and within a development team is face-to-face conversation.

Working software is the primary measure of progress.

Agile processes promote sustainable development.

The sponsors, developers, and users should be able to maintain a constant pace indefinitely.

Continuous attention to technical excellence and good design enhances agility.

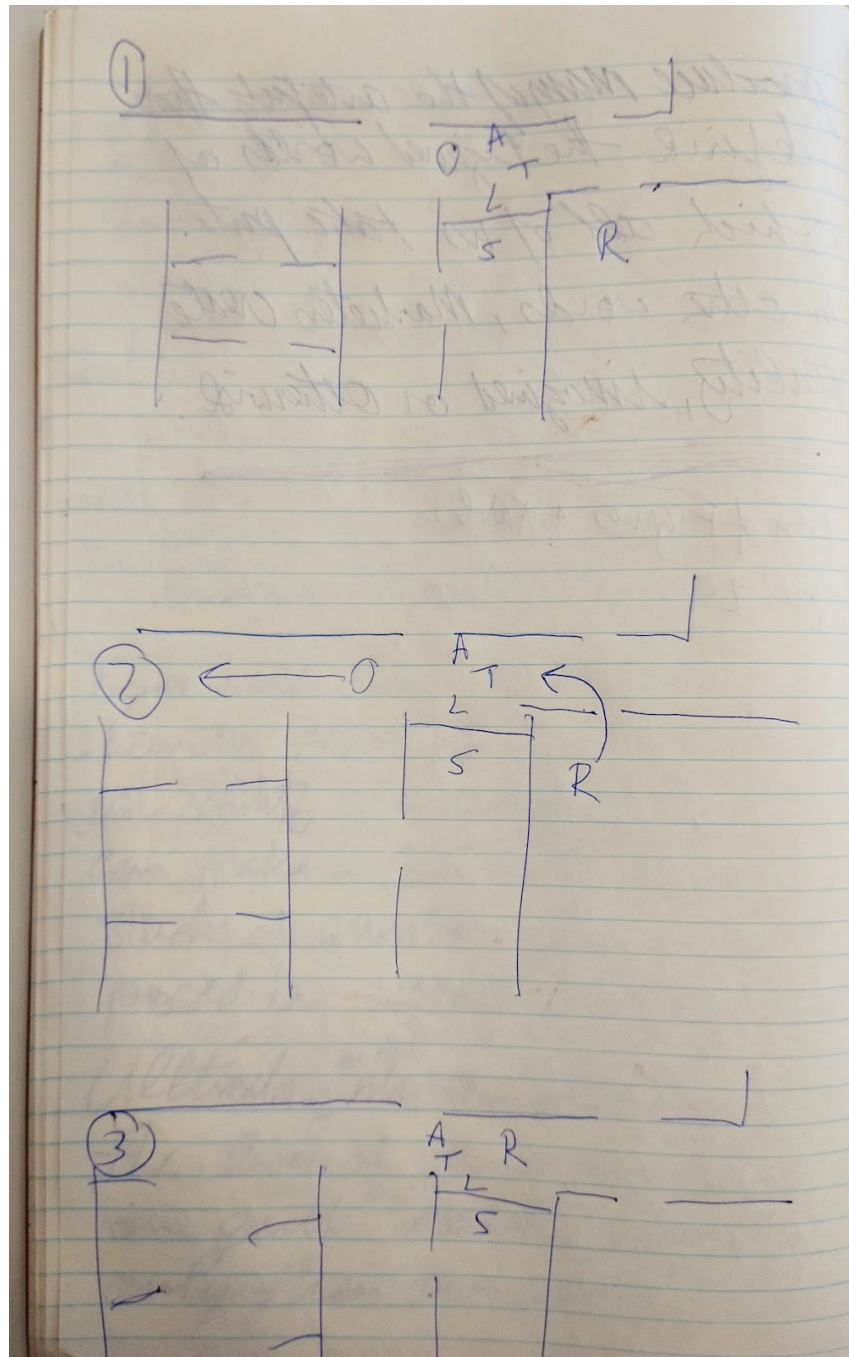
Simplicity--the art of maximizing the amount of work not done--is essential.

The best architectures, requirements, and designs emerge from self-organizing teams.

At regular intervals, the team reflects on how to become more effective, then tunes and adjusts its behavior accordingly.’

Source: <https://agilemanifesto.org/principles.html>

Appendix 2



Example of field notes showing the movement of actors in an exchange about work scheduling. See Chapter 6, Section 6.4.3.2 *Agile organisers*. Key: O = Orlando, A = Andrea, T = Ted, L = Lawrence, S = Shirley, R = Robin.

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