

# The mental models of HR professionals as strategic partners

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## ABSTRACT

*In this paper, we elicited and examined mental models of human resource professionals, regarding the interrelationships of important elements in shaping competitive strategy, for consensus or systematic variation, testing for HR's distinctive contribution at the strategy table. In order to examine their mental models, we collected empirical data from a stratified non-probability respondent sample of HR professionals in three stages: semi-structured informant interviews; free list and rank ordering tasks; and drawing exercises. Performing consensus analysis of respondents' mental models, we found that: First, as a group, HR professionals lack a robust, integrated HR strategic perspective; second, consensus views of labor relations practitioners and business unit generalists emerge as most distinctive and most people-focused. As one of few scholarly empirical examinations of HR practitioners' mental models on their view as strategic partners, this study challenges the normative calls among scholars and professional organizations for HR's participation in strategy formulation.*

**Keywords:** human resource practitioners, strategic management, occupational culture, managerial cognition, mental models, cause mapping, consensus analysis

What mental models have human resource ('HR') professionals formed about strategic forces affecting their organizations? Answers to this question may affect their influence and effectiveness where they work, the strategies and practices of their firms, the workplace experiences of their workforces, and the professionalism of human resources as a *strategic partner*. Although HR scholars and professional organizations state normative views, the content of HR managers' strategic models has been empirically unexplored, until this research.

Accounts and discussions in both the popular press (McDonald, 2001) and academic literature (Beatty & Schneier, 1997; Becker & Gerhart,

1996; Becker, Huselid, Pickus, & Spratt, 1997; Becker, Huselid, & Ulrich, 2001; Burrows, 1996; Galpin & Murray, 1997) report a growing sense of urgency on the part of HR leaders in firms to become strategic partners with colleagues who lead other units, and to 'have a seat at the table' when firm strategy is determined. Some scholars (e.g., Jackson & Schuler, 1999; Lengnick-Hall & Lengnick-Hall, 1999) have stipulated elements and relationships that are most important in developing firm-level and human resources strategies. On behalf of HR leaders, the authors ask: 'How can we ensure that HR is *at* the table – and not *on* the table?' (Becker et al., 2001, p. 1; emphasis original).

The scholarly human resource management (HRM) literature makes clear that HR is always involved in execution of the *people* portions of an overall strategic plan, but infrequently involved in the initial development of that plan. When Becker et al. (2001) seek to ensure that HR is *at the table*, they must mean HR's active participation in the formulation of the firm-wide strategic plan, not its execution. The claim seems an unconditional one: HR, simply because it is HR, deserves to participate. Yet recent scholarship suggests a continuing, substantial gap between the views of academics and practitioners (Rynes, 2007). Thus, our research undertakes not to promote the manifesto, but to examine empirically whether HR professionals have developed any consensus strategic perspective consistent with a broad claim to seats at strategy formulation tables.

Academic interest in strategic HRM is not limited to the United States; for example, Boxall and Purcell (2000, 2003) examine and contrast European and American perspectives. While Kulik and Perry (2008) explore perceived changes in the reputations of American HR functions that practice a 'devolution' strategy, pushing people management responsibilities long absorbed by HR back onto line management, Kulik and Bainbridge (2006) contrast the views of Australian HR (hopeful) and line managers (skeptical) toward this trend. Lansbury and Baird (2004) examine the US experience in broadening the horizons of HRM, for possible lessons to be learned among Australian practitioners. Previously, Betcherman, McMullen, Leckie, and Caron (1994), Lundy (1994), Truss and Grattan (1994), Schuler (2001), and Schuler and Jackson (2001) studied strategic HR management issues in non-US contexts.

In addition, leading HR professional development organizations across the globe have focused substantial training effort on this strategic contribution question. The Society for Human Resource Management, the world's largest association devoted to HR concerns, certifies practitioners in *strategic HR*, using a 'combination of proven practices, comprehensive case studies and all-inclusive toolkits,' and familiarizes them 'with the strategic

link between HRM practices and systems and organizational performance and competitive advantage' (SHRM, 2009, p. 9, 11). Another major professional organization, WorldatWork, likewise offers such professional education globally.

Scholars in organizational studies have argued that administrators seek to manage their environments '...to obtain resources needed for their survival [and] to strike favorable bargains for themselves' (Scott, 1998, p. 116). Rynes (2004, p. 205) suggests that HR has followed this course in pursuing its strategic voice, and asks whether it '... would have maintained more power and influence ... if it had declined to follow the strategic [alignment] approach'. She cites Jacoby (2003, p. 166) favorably, that 'insisting on the virtues of employee-centered HR policies, emphasizing the long term, and persisting in being employee advocates' would have been career suicide for most HR practitioners ... raised by such a low-status function as HR'. This analysis provides one answer, albeit perhaps an 'unprincipled' one, to the question asked at the outset: 'how can we ensure that HR is ... not on the table?'

In a similar vein, Kochan (2004) recently warned international scholars and practitioners about 'a crisis of trust and a loss of legitimacy' arising from how American HR professionals have learned about and sought to occupy strategic roles. Rynes (2004) and Kochan suggest that HR has changed its own mental model, to accommodate the views of its business partners. The issue of HR as strategic partner – too much or too little alignment and influence – seems increasingly to extend beyond US borders. Pfeffer (2005) suggests that diagnosing and changing of mental models held within organizations may be the most important task that faces HR functions, in part because of resulting effects on organizational strategy. But this begs a prior question: what mental models have HR professionals themselves learned, in framing and conducting their own roles as strategists-in-waiting within their workplaces? Will HR's perspective be distinctive or, as Rynes and Kochan fear, largely redundant of others' views? Because managerial time and attention are limited and in

great demand (Dutton & Ashford, 1993), a firm may rightly expect each additional participant to add distinct value at the strategy formulation table, as considerations of appropriate group size and dynamics must also be weighed (Fogg, 1994).

These issues lead to our research questions. In the wake of nearly 20 years of promotion of a strategic role for HR, what elements do its practitioners believe are strategically important, and why may they hold those beliefs? Do they share common, distinctive perspectives about what is strategically important? If they have varied views, why may those differences exist?

In this research, we use occupational cultures theory to suggest why HR professionals may develop views distinctive to their field, or to one or more subspecialties thereof, and legitimacy theory to suggest why they may not. We employ a managerial cognition perspective, and specifically methods for the elicitation of mental models, in capturing the views of HR professionals. Our study will advise whether distinctive strategic mental models are held within or across the HR profession, with implications for whether the function or any subgroups within it may be expected – after all that has been written and taught about strategic HRM – to make a *distinctive* contribution in firm strategizing, and what that may be.

## LITERATURE REVIEW

### Occupational cultures theory

Culture is a matter studied by many but agreed by few. Martin (2002, pp. 56–59) catalogs 12 definitions that ‘reflect the range ... currently in use among organizational culture researchers’. It is unnecessary for our purposes to review this panoply here. With Louis (1985), we see culture as ‘... a set of ... meanings shared by a group of people [that] are largely tacit among the members, are clearly relevant to a particular group, and are distinctive to the group’.

This stipulation of shared and at the same time distinctive meaning may apply at different levels of an organization, as Martin has suggested. She

identifies three paradigms. The integration paradigm reflects a view that ‘culture is a monolith’ (Meyerson & Martin, 1987, p. 626). A differentiation paradigm reflects instead a lack of consensus across organizational subunits but agreement within them. ‘Subcultural identifications may be orthogonal to a dominant culture, reflecting ... occupational ... or project affiliations’. (Gregory, 1983; Meyerson & Martin, 1987, p. 630; Van Maanen & Barley, 1984). Any differentiated subculture ‘is a smaller version of ... integration, characterized within its [lesser] boundaries by consistency and consensus’ (Meyerson & Martin, 1987, p. 631). The third paradigm, fragmentation, is marked by a lack of any consensus, and cultural manifestations appear partly congruent, partly inconsistent, and partly tangential or random (Martin, 2002, p. 105). These three will shape the content and order of our hypotheses.

Occupational cultures theory suggests that members who share a distinct professional background may comprise a differentiated subgroup culture within a larger organization. In one example, Louis (1985, p. 79) showed that a firm’s in-house accountants identified more closely with the norms they learned within their profession than with the ideology of the organization for which they worked. Occupational cultures may shape the mental models learned by subcultural participants and in turn affect intra-organizational synergy. Hansen (1995, p. 61) provides contrasting mental models of two relevant occupational cultures: ‘general managers relate objectives to business plans while human resource developers define objectives as learning expectations’. Mental models in turn guide understanding and strategic decision making. Hence, professional affiliations may affect occupational cultures and, through mental models in turn, differentially affect strategic views and contributions to strategy.

### Mental models within human resources

The content of mental models (Langan-Fox, Wirth, Code, & Langfield-Smith, 2001), more specifically

comparisons of cause or influence mapping as drawn by the study's respondents among a standard set of elements, served as the principal focal variable in this study. Mental models are 'deeply ingrained assumptions, generalizations, or even pictures and images that influence how we understand the world and how we take action' (Senge, 1990, p. 8, citing Gardner, 1985). Cause mapping has been employed in scholarly circles for over 30 years (Axelrod, 1976), and many varieties and usages have appeared, as referenced by Markoczy and Goldberg (1995, p. 306). Hansen (1995, p. 61) notes that '...the mental models ... based on the work one does are culturally embedded and represent a myriad of organizational subcultures whose bonds may even extend beyond the boundaries of any one organization'.

A mental model consists of several elements: its key variables, the causal mechanisms that connect those, and the overall structure and boundaries of the system as envisioned by the model's owner (Serman, 2000, p. 86). What elements and what connections among them are perceived most important by HR professionals? The mental models with regard to strategy formulation that HR professionals have developed through their experience and education may be said to guide their strategic contributions.

We have interpreted the call for HR to sit at the strategy table to be an unconditional one, a profession- or group-based claim, likely implying that HR professionals may be counted upon to bring the same perspectives to the table, wherever that table is set. This implies in turn the existence of group consensus, manifest in shared mental models. Or, in competing hypotheses, we perhaps will find that consensus models are learned within HR subgroups, i.e., within occupational subcultures.

### **Contents of, and consensus among, mental models**

Identification of the elements of practitioners' strategic mental models, of the principal causal relationships they identified among those elements, and of degrees of content consensus among those cause maps, were based on respondents'

drawings of causal influence arrows directionally linking pairs among 15 elements of a standard set. (Our development of this standard set comprised the third stage of qualitative data collection as described in the section Methodology). Each respondent was asked to draw a causal influence map (Langan-Fox & Langfield-Smith, 2000, p. 255) specifying the causal relationships or influences that he or she identified among this standard set as most important in formulating corporate strategy.

A drawing exercise is a recognized method for eliciting respondents' mental models of a domain of interest (Langan-Fox & Langfield-Smith, 2000; Markoczy & Goldberg, 1995). Maps that elicit causal relationships have been employed in management circles for over 30 years (Axelrod, 1976; Markoczy & Goldberg, 1995), including the causal loops mapping of perspectives on strategic organizational change. (Bougon & Komocar, 1990). A number of varieties, outlined in Huff (1990), Eden, Ackermann, and Cropper (1992), and Laukannen (1992), have been developed, and these have been used to examine both individual and group belief systems. Olson and Biolski (1991) and Langan-Fox and Langfield-Smith (2000) have evaluated the techniques for eliciting and representing mental models at both levels. The use here of a standard set of 15 items follows their recommendation that an identical concept set be presented to all respondents when eliciting perceived causal relations. Because the concept set was constant, the reliability (Schutt, 1999, p. 87) and comparability (Hodgkinson, 2002, p. 68) of the analysis across all respondents is enhanced.

Consensus theory uses patterns of agreement among respondents to determine culturally correct understandings of a domain of interest (Weller & Romney, 1988, pp. 74-75). Graphical depictions of mental models compactly offer a wealth of data to be analyzed and invite a range of analytic approaches to be employed (Seitz, 2000; Sparrow, 1998). For example, a respondent may connect an element or topic to one or

more others, or may depict it as causally disconnected from all the others. The causal connection made by a respondent between two elements may flow in one direction or the other, or both. Thus, on a 15-item map, one could draw up to 225 one-directional causal arrows, because each item could be the source of up to 15 arrows and the target of an equal number. Conversely, the infrequency, the absence, or the unidirectional nature of causal arrows that touch an item may tell rich stories about an individual's perception of its relevance and 'influence relationships' (Markoczy & Goldberg, 1995).

### Forces for strategic integration

The knowledge and perspectives of the HR profession are promoted and disseminated globally through several channels. International associations maintain American and international chapters which regularly conduct conferences and training programs and publish information in print and electronic formats. HR training is provided at colleges and universities world wide, and the globalization of business practices has led to increased transnational exchange of HR talent and information. Within the United States, the site of this first study, it is consistent with the arguments for HR's strategic participation to propose at the outset that the profession has a consistent, integrated strategic mental model.

Hypothesis 1: Human resource professionals substantially agree upon factors and causal relationships that are most important in formulating strategy.

What is the content of that model? HR professionals may identify quite strongly with the norms and belief systems of their calling. If so, the human resources discipline may serve as a feeder culture, instilling in its members a common yet distinctive HR view of 'what is strategically important' which spans individual firms. HR traditionally has been the *people* function within organizations, '... the so-called official voice of employee relations in

most organizations ... the only function with the primary responsibility or safeguarding employee health, safety, and well-being...' (Rynes, 2004, p. 207). Indeed, the academic literature does not lack for varied prescriptions of 'employee-friendly best practices' for HR to promote and firms to adopt. For example, Kochan and Dyer (1993, p. 572) offer 10 principles of 'mutual commitment firms,' and Pfau and Kay (2002) prescribe 21 employee-friendly people management practices that firms must follow to maximize shareholder value. Believing 'that many HR practitioners truly do want to help people', Rynes (2004, p. 207) suggests that HR may craft 'a more inclusive vision that melds humanism with efficiency, in much the same way that some European countries design their economics systems to reflect capitalism with a human face'. Such framing and shared values may promote an integrated 'HR view' of what is important in strategy formulation that is distinctive in its emphasis of such elements.

Hypothesis 2a: Human resource professionals agree upon causal relationships that emphasize 'people' considerations as most important in formulating strategy.

Scholars interested in legitimacy or legitimating process, however, suggest the opposite emphasis and a competing hypothesis: HR managers approach their functions and roles in a self-interested light, in other words following 'the law of the stronger' (Zelditch, 2001). According to this perspective, as a group of professionals is 'colonized' by the more powerful profession, cognitive taken-for-grantedness shared by members in the former group becomes fragile (Stryker, 2000). This pursuit of legitimacy or legitimated norms is contagious across members of a profession (Zucker, 1987). Dutton and Dukerich (1991) provided a seminal example that organizational members pronounce their responses consistent with legitimated pressures or assertive images of their organization. According to this perspective, administrators actively manage their



environments, not just their organizations, as Aldrich and Pfeffer (1976, p. 83) point out.

This view suggests a Machiavellian path for HR to pursue in seeking acceptance at the strategy table. Although HR may calculate and distribute the pay checks, it knows well who signs them. Its goal in following others' strategic leads is to obtain the legitimacy it deems necessary for survival (Scott, 1998, p. 116). With its focus on marshalling power and playing politics within an organization, the legitimacy perspective suggests that HR professionals may develop strategic mental models that emphasize traditional elements of competitive strategy.

Hypothesis 2b: Human resource professionals agree upon causal relationships that emphasize 'non-people' considerations as most important in formulating strategy.

### Forces for differentiated or fragmented strategic models

The existence of a single, HR-distinctive strategic view is not the only possible outcome. Martin's 'three-perspective theory of culture' (2002) suggests that the views of HR professionals instead may be clustered according to areas of HR specialization or experience, or may evince random patterns. Subgroup cultures may be developed and encouraged by work experience and training. For example, an affiliate of WorldatWork administers programs for gaining and maintaining professional certifications as Certified Compensation Professionals, Certified Benefits Professionals, and Global Remuneration Professionals. The program offers HR practitioners distinctive focus within their subgroups, but not necessarily more broadly. 'Certification speaks volumes about who you are as a professional... you establish yourself as being committed to remaining on the leading edge of your profession' (WorldatWork, 2009).

Research in selective perception (Dearborn & Simon, 1958) and self-serving biases in executive

belief (Chattopadhyay, Glick, Miller, & Huber, 1999) outline mechanisms by which individuals who identify with a particular subfunction develop within-group beliefs that may conflict with those held in other areas. These theories, together with Martin's, suggest that distinctive subgroups may form, and that training, practice, and certification in a discrete knowledge area may be expected to influence the mental models of those thus educated. In competition with previous hypotheses, we predict in Hypotheses 3a and 3b evidence of differentiated subgroup cultures. Compensation and employee benefit professionals may, for example, hold mental models which emphasize some of the key foci of their specializations, such as employee competencies or demographics.

Hypothesis 3a: Human resource professionals with substantial experience in compensation and benefits distinctively agree upon causal relationships that are most important in formulating strategy.

Except in a few sectors of the economy, the membership and influence of organized labor has waned in the United States (Clawson & Clawson, 1999), in the United Kingdom (Machin, 2000), and elsewhere in recent decades. For those HR professionals working in such sectors today, as well as those who 'cut their teeth' in collective bargaining matters earlier in their careers, the challenge of labor-management relations in America likely provided strong, somewhat common lessons. By law, such professionals negotiate with their union counterparts not only employees' wages and benefits, but also their hours and other terms and conditions of employment: i.e., the work they do, and how they do it (NLRA, 1935). Their regular involvement in negotiations involving such business-focused non-economic matters, professional education and formal training, and employer association information exchanges may shape mental models which are distinctive from those of other HR colleagues.

Again, we suggest evidence of a differentiated subgroup culture among them.

Hypothesis 3b: Human resource professionals with substantial experience in labor relations and collective bargaining distinctively agree upon causal relationships that are most important in formulating strategy.

The issue of strategic relevance is foremost among concerns of SHRM, which aims to advance the HR profession 'to ensure that HR is recognized as an essential partner in developing and executing organizational strategy' (SHRM, 2008). Generalists are the HR professionals first hired by new and growing firms, and only later may specialists be hired as needed. In operating units, HR generalists are those who serve the business partner role, whether or not thus styled, with line management. Thus, we may expect generalists to have a perspective that is broader and less focused than that of specialists. Their mental models may be more similar to labor relations professionals but, lacking the crucible of collective bargaining, perhaps less operationally and quantitatively focused. Among these 'first practitioners' of HR, in organizations that span all of society's diversity and all manner of employers, consensus regarding strategic forces may prove elusive. A fragmentation view of their HR strategic models seems most appropriate.

Hypothesis 3c: Human resource professionals with substantial experience as HR generalists do not distinctively agree upon causal relationships that are most important in formulating strategy.

In many large corporations, organizational design has developed to a multi-divisional structure, in which multiple operating units supply products and services to external customers, under the overall direction of a 'parent' or corporate staff office (Chandler, 1996; Williamson, 1975). As Chandler notes, this design has left

the broad decisions of intended strategy to a corporate office team of senior general managers, while operational decisions and implementation are located at the operating unit level (Chandler, 1996, pp. 382–383 cited in Williamson and Ouchi, 1981, p. 359). Distinctive sets of HR skills and knowledge have developed as a result, in response to the situations in which the professionals find themselves. Many corporate HR professionals, such as directors of compensation or of benefits plans administration, are specialists in policy-making and specialized functional roles (Purcell & Ahlstrand, 1994). By contrast, as suggested above, many practitioners in operating units are HR generalists who rely more on understanding their unit's business situation than on specialization (Noe, Hollenbeck, Gerhart, & Wright, 1994, p. 72–74).

Differences in the corporate form in which experience is acquired can contribute to differentiation in the mental models held by HR professionals. For example, to the extent that professionals employed in corporate HR staff roles often are called upon to perform specialized roles, their mental models are likely to display lesser breadth. Conversely, a practitioner at an operating unit will have been exposed to the relationships between its business and a greater number of HR subject areas, and thus may be expected to have a less specialized mental model of HR strategy considerations (Noe et al., 1994, pp. 72–74). Consistent with the differentiated subcultures explanation, we posit distinctive within-group consensus in two groups of HR practitioners.

Hypothesis 4a: Human resource professionals with substantial experience in corporate headquarters staff environments distinctively agree upon causal relationships that are most important in formulating strategy.

Hypothesis 4b: Human resource professionals with substantial experience in business operating or line units distinctively agree upon causal relationships that are most important in formulating strategy.

## METHODOLOGY

To test for patterns of consensus or difference, we collected data in three stages, combining interview, documentary, and *in situ* drawing exercises, as cataloged by Hodgkinson, Maule, and Bown (2004, pp. 4–7). Our first stage was exploratory, using two qualitative methods to determine elements that might be included in practitioners' mental models with regard to firm-level and HR strategy. Building on that work, the second stage sought out commonality of views with respect to strategically important elements, and the third examined strategically important causal interactions among such elements.

In stage one, we began with semi-structured interviews (Spradley, 1979) of 20 informants. These sought to understand human resource strategy and system elements in the words of these practitioners, and to pursue leads that their responses suggested. These preliminary interviews were intended to develop theoretical saturation (Strauss & Corbin, 1998, p. 158) of the topic, and to pre-test and refine other methods that would then be employed on a larger scale.

In stage two, additional data were collected from these 20 informants plus 31 other human resource professionals. The final sample size with complete data sets was 47 due to incomplete responses from five individuals. All data were collected in 60- to 120-min, one-on-one sessions with the first author, or very rarely by e-mail or fax, and no identity of any respondent was disclosed to any other. Based on the human resource literature reviewed above, a purposive or stratified non-probability respondent sample (Schutt, 1999, pp. 129–130) was solicited. In targeting respondents, we sought balanced distributions across each of the following dimensions: gender, specialist, and generalist roles; corporate office and business unit experience; highest role or attained level of management (vice president, director, or manager/business partner); and length of career. Each respondent completed a spreadsheet-based survey instrument that gathered information on

those predictive dimensions. Usually with a current resume in hand, each respondent indicated the scope (hands-on, supervisory or both) of his or her human resource efforts across 20 areas of generalist, labor relations, or total rewards responsibility and work venues, broken down into 10 successive two-year intervals. (We normalized these inputs, calculating values that represented each individual's percentages of maximum responsibilities in each practice area over the 20-year period.) Measurement of most variables thus was possible at the ratio level.

Table 1 summarizes some of the demographic data: 43% of respondents are female, no one expertise area is dominant across all 47 respondents, and the distribution of corporate office and business unit work experience is nearly equal. On average, respondents' length of HR experience is around 15 years, and the number of firms for which they have worked is 3.5. Two-fifths of the 47 respondents had attained vice-president rank and the balance had achieved director or manager levels. Overall, mean and range values indicate that the desired diverse respondent sample was obtained. Due to career progressions and inter-firm transitions, many respondents developed multiple expertises at the 20% threshold level or greater, so that the subgroups depicted later in Figures 3–5, and again in Figures 6 and 7, intentionally are not mutually exclusive.

The respondents also participated in stage two in a free list exercise (Weller & Romney, 1988), each composing his or her written list of items responding to the question: 'What things should be considered in forming HR strategy?' The early free lists ranged from 7 to 43 items in length (mean = 18.97; SD = 7.93). Three scholars, each having more than two decades of experience with HRM issues, independently classified the 444 items provided by the combined free lists, identifying a range of 45–58 topics that were suggested by the lists. The three raters agreed upon the combined list of topics, from which 27 of the 30 most frequently mentioned topics, each identified from 14 to 77 times within the aggregate free list, were



**TABLE 1: DESCRIPTIVE STATISTICS OF THE RESPONDENT SAMPLE (N = 47)**

Variables (experience)	Mean	SD	Min.	Max.
Gender	0.43	0.50	0	1
Overall length of HR experience	15.70	5.90	0	20
Number of employer firms	3.50	3.04	1	16
Experiences in other areas (not HR)	0.89	2.28	0	10
<i>Expertise:</i>				
Compensation and benefits experience	0.29	0.20	0	0.82
Labor relations and bargaining experience	0.16	0.26	0	1.00
HR Generalist experience	0.32	0.23	0	0.79
<i>Experience:</i>				
Corporate office experience	3.43	3.51	0	10
Business unit experience	3.19	3.67	0	10
<i>Management level:</i>				
Percentage of sample	VP	Director	Manager	
	0.40	0.26	0.34	

selected. To increase the overall conceptual scope of the rank order exercise that would follow, we supplemented these with 21 other topics. These additions were drawn from two process models of the development of human resources strategy (Jackson & Schuler, 1999, p. 18; Lengnick-Hall & Lengnick-Hall, 1999, p. 44) or from items less frequently mentioned in the aggregate free list (e.g., workforce reductions, diversity and firm size, with frequencies of 6, 2, and 2, respectively). The combination of sources produced an initial expert list of 48 topics, which is set forth in the left-hand column of Table 2. Our multi-step process was similar to the pool of constructs identification method used by Markoczy and Goldberg (1995, pp. 309–310). Subsequently, we asked each practitioner to rank order the relative importance of these 48 topics in formulating HR strategy, predominantly through a card sort process (Weller & Romney, 1988, p. 44).

From this expert list, as rank ordered, the first author identified a standard set of 15 key items for use in stage three, balancing their individual conceptual importance with the completeness of

the set (Markoczy & Goldberg, 1995, p. 311). Thus, Jackson and Schuler's integrative framework (1999, p. 18) supplied 'laws and regulations' and 'industry structure' to the set of 15, and both they and the Lengnick-Hall strategy interdependence perspective (1999, p. 44) contributed 'external labor market'. The standard 15 items are set forth in the right-hand column of Table 2.

In stage three, we asked each respondent to draw a causal influence map. Each was instructed to insert up to 27 one-directional arrows among the standard set of 15 items, identifying those causal relationships that he or she identified as most important in formulating firm strategy. Our analysis of content consensus among practitioners' mental models was based on these 47 drawings of causal influence arrows linking the 15 items.

## RESULTS

In order to test our eight proposed hypotheses, we analyzed consensus or contrast diagrams presenting causal relationships among 15 items created by the 47 respondents. Specifically, in testing Hypotheses 1, 2a, and 2b, we look at *consensus*

TABLE 2: TOPICS AND ITEMS DEVELOPED BY RESPONDENTS

48-item rank order list	15-item drawing exercise
1 Aggregate employee competencies	Aggregate of employee competencies
2 Benchmarking and environmental scanning	Clients and markets
3 Clients and markets	Core competencies of the firm
4 Competency acquisition/development	Culture of the firm
5 Core competencies and processes	Economic conditions
6 Costs to acquire/maintain competencies	Employee demographics
7 Culture	Employee relations and satisfaction
8 Diversity	External labor markets
9 Economic conditions	Firm finances
10 Economic efficiency and productivity	Human resource strategy
11 Employee compensation and benefits	Industry and competitors
12 Employee demographics	Legal and regulatory developments
13 Employee motivation and interests	Organizational agility, readiness and buy-in
14 Employee relations and satisfaction	Strategy of the firm
15 Employee retention/turnover	Vision and mission of the firm
16 Employee skills and competencies	
17 Employees	
18 Employees' work-life balance	
19 Executive leadership	
20 External labor markets	
21 Firm's external environment	
22 Firm's finances	
23 Firm's overall goals and objectives	
24 Firm's overall strategy	
25 Firm's size	
26 'Gap' analyses	
27 How/by whom HR tasks are delivered	
28 HR programs, plans and policies	
29 HR staff's capabilities	
30 HR's access to/influence on firm's strategy-making	
31 HR's budget	
32 HR's image within the firm	
33 Human capital	
34 Industry and competitors	
35 Internal communications	
36 Knowledge of action/reaction feedbacks	

Continued

TABLE 2: CONTINUED

48-item rank order list	15-item drawing exercise
37 Legal and political environment	
38 Legitimacy vis-à-vis stakeholders	
39 Maturity of firm and its products	
40 Organizational agility, readiness and buy-in	
41 Organizational performance	
42 Sense making and decision making	
43 Structure and organizational attributes	
44 Technology	
45 Total workforce-related costs	
46 Union considerations	
47 Vision and mission	
48 Workforce reductions	

across all respondents at quartile levels of agreement, presented in Figures 1 and 2. At the 25% level of Figure 1, in which each arrow there was inserted by 12 or more of our 47 respondents, the composite drawing appears to be a rich one, exhibiting 35 arrows and 27 different closed influence feedback loops. (A feedback loop begins with and returns to a source element directly or through one or more intermediate elements.)

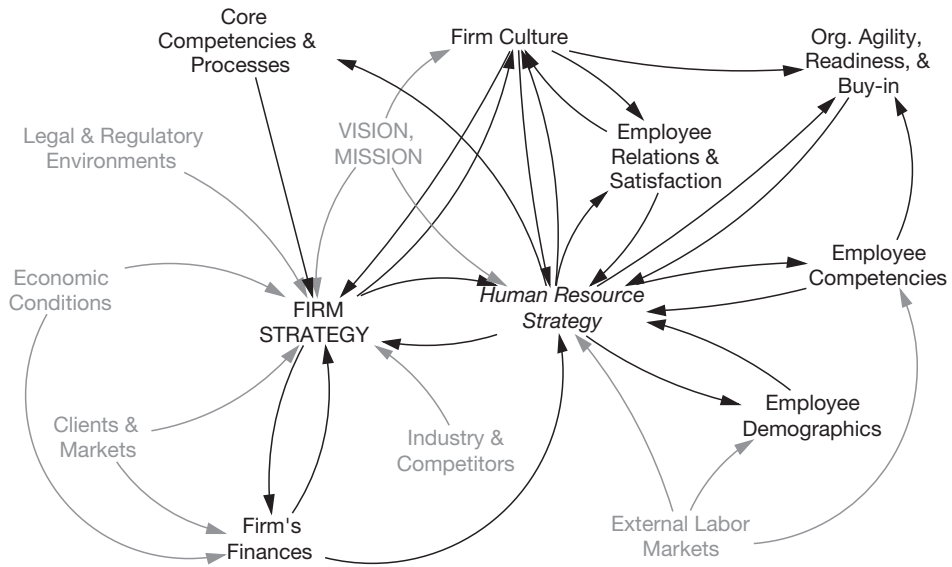
At the 50% level of agreement across HR that is presented in Figure 2, the number of arrows has decreased from 35 to nine, and feedback loops are no longer evident. Although consensus sometimes is understood to mean unanimity of views, we need not take so strong a position. In contrast to Figure 1, the 50% level of agreement arrows in Figure 2 present so spare a model as not to support Hypothesis 1.

Only three causal connections enjoy 75% acceptance. No causal connections between firm strategy and HR strategy (in either direction), nor any from people-related factors, are among those. Thus, HR practitioners' composite maps at the 50% and 75% levels of consensus depict some shared understanding of important strategic influences, but it is *a view lacking in people-related inputs* (if not of people-related effects). Because

of the consensus omission of people forces, we do not find the HR differentiation paradigm that we predicted in Hypothesis 2a.

Six of the nine arrows at the 50% level depict external influences on firm-level strategy, while a seventh suggests a subsidiary relationship of human resource strategy to the overall strategy of the firm. These are consistent with the principle of cascaded strategies in the general management literature, and they suggest that the overall perspective of HR follows this traditional view. In this light, and subject to the subgroup analysis and Discussion that follow, Hypothesis 2b was supported.

In testing Hypotheses 3a–c, 4a, and 4b, we sought patterns of differentiation between the consensus cause map of respondents who substantially exhibited one of our focal predicting variables and the corresponding map that represented the views of the balance of the respondents. For Hypotheses 3a–c, we sorted respondents into *within* and *without* subsets at the 20% level of reported experience. (According to our weighting of respondents' career history inputs, this level corresponded to five years of 'hands-on' experience or 10 years of supervisory experience in the focal area of HR practice, within the previous 20 years.) For Hypotheses 4a and 4b, we sorted



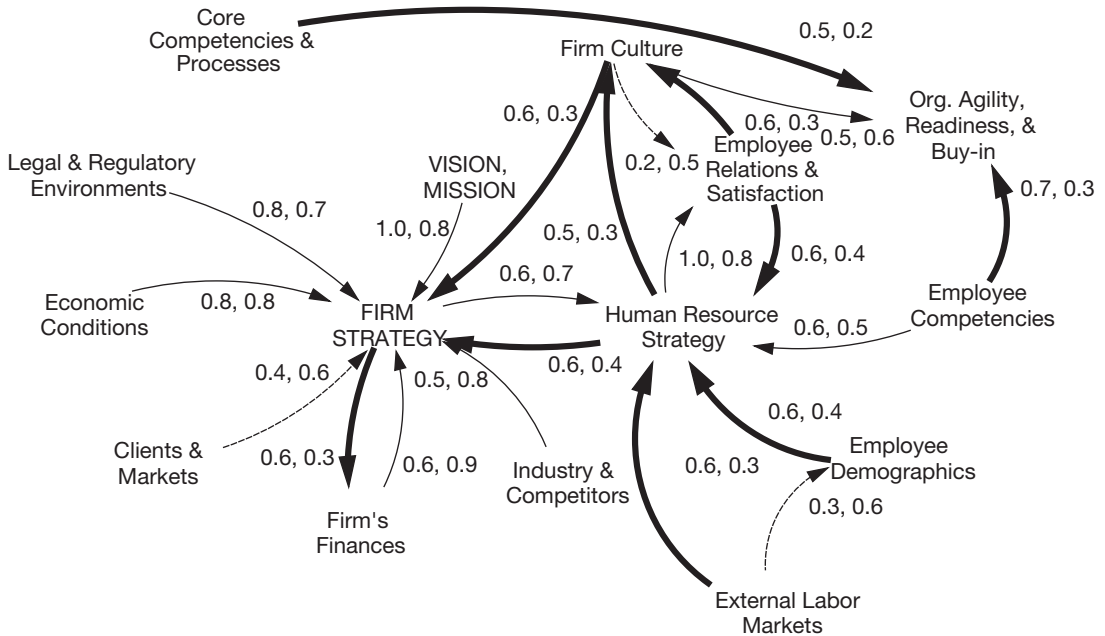
**FIGURE 1: OVERALL CONSENSUS DIAGRAM: CAUSAL ARROWS DRAWN BY 25% OR MORE OF RESPONDENTS.** Notes. 1. Black arrows constitute elements of one or more closed-loop causal paths ('loops'). 2. Black text indicates items within one or more loops. 3. Gray arrows and gray text items are not elements of any closed-loop. 4.  $n = 47$  respondents, 1092 causal arrows.



**FIGURE 2: OVERALL CONSENSUS DIAGRAM: CAUSAL ARROWS DRAWN BY AT LEAST 50% (75%) OF RESPONDENTS.** Notes. 1. Black arrows were drawn by at least 75% of 47 respondents. 2. Gray arrows were drawn by 50-74% of the respondents. 3.  $n = 47$  respondents, 1092 causal arrows.







**FIGURE 4: CONTRAST DIAGRAM: CAUSAL ARROWS DRAWN BY SUBGROUPS, AS SORTED BY DEGREE OF LABOR RELATIONS EXPERIENCE.** Notes. 1. Ten bold solid arrows represent those drawn by at least 50% of the members of the focal subgroup only. 2. Three dashed arrows represent those drawn by at least 50% of the members of the non-focal subgroup only. 3. Nine thin solid arrows represent those drawn by at least 50% of the members of both subgroups. 4. Rounded decimal values arrayed with an arrow present the percentages of subgroup members who drew that arrow. Array order, Labor (focal) subgroup, then non-focal non-Labor subgroup. 5. n (subgroups) = 14 labor, 33 non-labor.

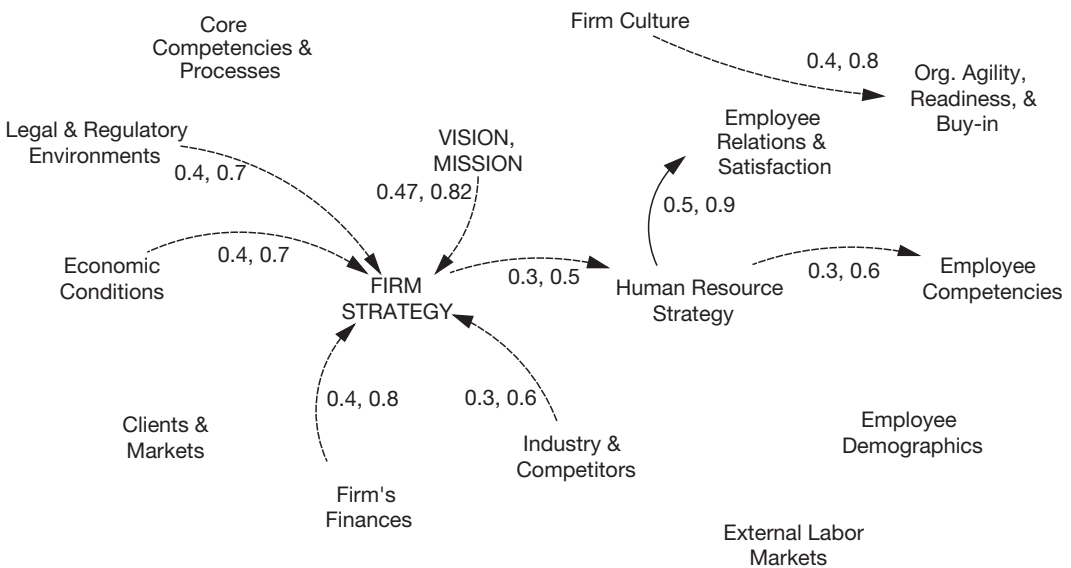
Resource Strategy to Employee Competencies and from Employee Demographics to Human Resource Strategy are most suggestive of a somewhat distinctive mental model held by such professionals.

Figure 4 provides strong support for the differentiation paradigm as it relates to professionals with substantial experience in Labor Relations. At least half of subgroup members agreed on 19 arrows, and 10 of those causal relationships were uniquely depicted by within-group members at the 50% level of consensus. Here, Firm Strategy is a member of four feedback loops, and Human Resource Strategy of five.

Figure 5 provides no support for the differentiation paradigm as it relates to professionals with substantial experience as HR Generalists. A majority within this subgroup agreed on only

one causal relationship, and did so with much less agreement (50% versus 88%) than members of the corresponding without group. Figure 5 displays among HR Generalists fragmented learning relating to HR Strategy and a failure to stress some factors (involving competencies or organizational agility) that we might have expected.

Figures 6 and 7 present similar analyses involving subgroups comprised of HR professionals having substantial corporate staff or operating unit experience, respectively. Placed side-by-side, these figures provides support for the differentiation paradigm as it relates to locus of HR experience. A majority of the respondents with substantial Corporate Office experience (Figure 6) uniquely identified three causal relationships on the left, or *non-people*, side of the drawing. Conversely, a majority of the respondents with substantial



**FIGURE 5: CONTRAST DIAGRAM: CAUSAL ARROWS DRAWN BY SUBGROUPS, AS SORTED BY DEGREE OF HR GENERALIST EXPERIENCE.** Notes. 1. Zero bold solid arrows: none were drawn by at least 50% of the members of the focal subgroup only. 2. Eight dashed arrows represent those drawn by at least 50% of the members of the non-focal subgroup only. 3. One thin solid arrow represents those drawn by at least 50% of the members of both subgroups. 4. Rounded decimal values arrayed with an arrow present the percentages of subgroup members who drew that arrow. Array order, HR generalist (focal) subgroup, then non-focal non-HR generalist subgroup. 5.  $n$  (subgroups) = 30 HR generalist, 17 non-HR generalist.

Business Unit experience (Figure 7) uniquely identified, compared with non-group members, five causal relationships on the right, or *people*, side of the figure.

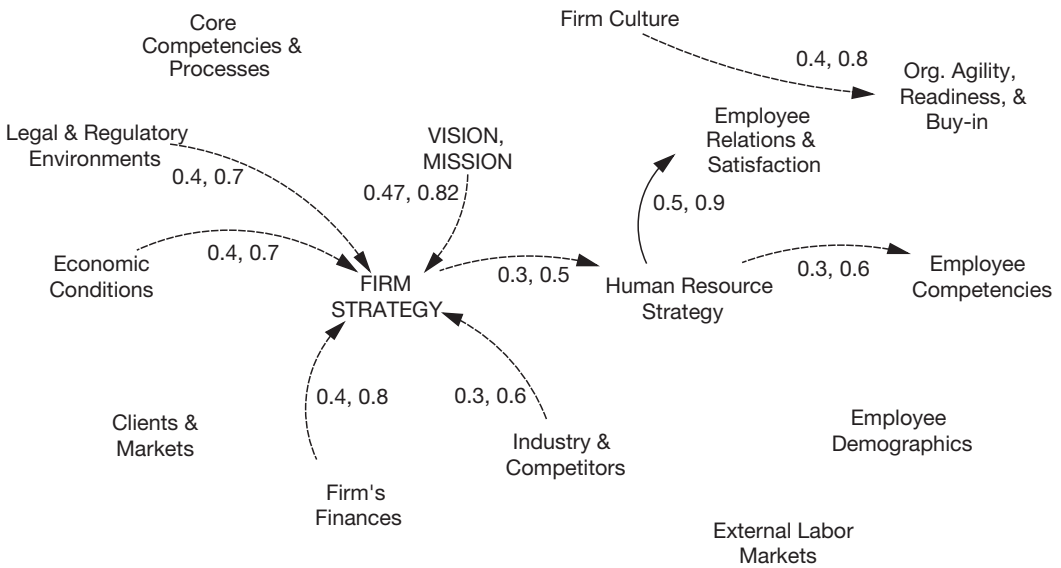
In summary, the Figures do not indicate an integrated HR perspective (Hypothesis 1, Figure 1), let alone one that emphasizes the right-hand or *people* elements (Hypothesis 2a, Figure 2) of the depicted domain, so those two hypotheses are not supported. Figure 2 suggests that HR professionals agree that the important causal relationships are *non-people* or left-hand connections, as predicted in Hypothesis 2b. Among expertise groups (Figures 3–5), the views of labor relations practitioners are most distinctive (Hypothesis 3b), only modestly differentiated as to compensation and benefits practitioners (Hypothesis 3a), and completely fragmented among HR generalists (Hypothesis 3c). Taken together, Figures 6 and 7 suggest that the differentiation paradigm applies

to the strategic views of those with substantial corporate headquarters or business unit human resources experience (supporting Hypotheses 4a and 4b, respectively).

## DISCUSSION

Based on our findings, we suggest several conclusions:

First, our drawing template necessarily positioned elements as right, left or centered, although we did not call the attention of our respondents to this. Still the left-hand elements largely are textbook competitive forces for top management to consider, while the right-hand elements are mostly within the purview of an HR function that is subsidiary to it. Thus a left-to-right reading is also a top-down one. The Figure 2 model of overall HR consensus suggests no common right-to-left or 'bottom up' (Westley, 1990) insight with which HR as a profession or feeder culture may seek to



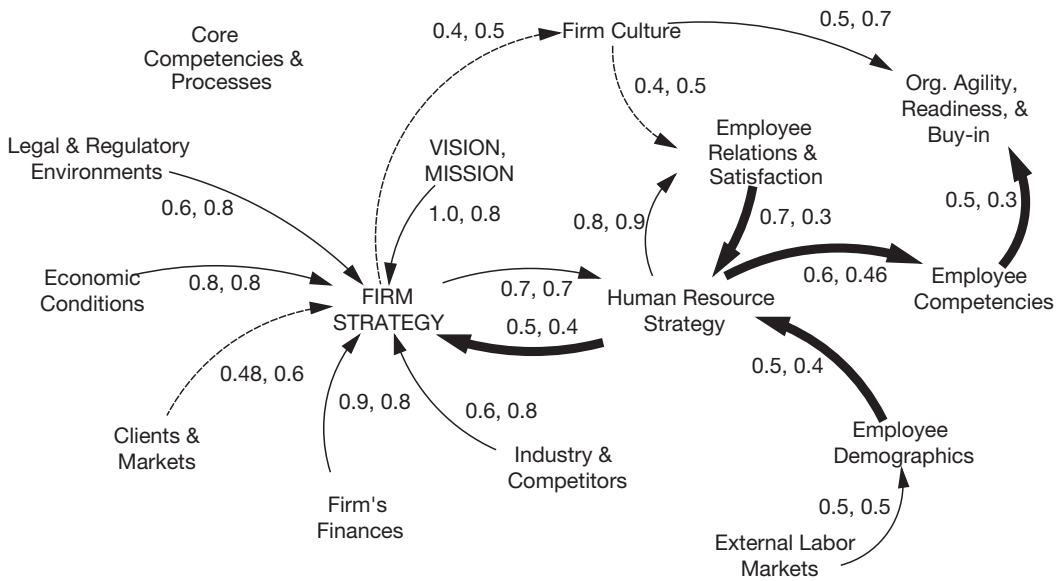
**FIGURE 6: CONTRAST DIAGRAM: CAUSAL ARROWS DRAWN BY SUBGROUPS, AS SORTED BY DEGREE OF CORPORATE OFFICE EXPERIENCE.** Notes. 1. Four bold solid arrows represent those drawn by at least 50% of the members of the focal subgroup only. 2. Three dashed arrows represent those drawn by at least 50% of the members of the non-focal subgroup only. 3. Seven thin solid arrows represent those drawn by at least 50% of the members of both subgroups. 4. Rounded decimal values arrayed with an arrow present the percentages of subgroup members who drew that arrow. Array order, corporate office (focal) subgroup, then non-focal non-corporate office subgroup. 5. n (subgroups) = 28 corporate office, 19 non-corporate office.

exert influence. Consistent with theoretical viewpoints on legitimacy or legitimating process, HR's consensus view seems shaped by those within a firm upon whom it most depends for resources: general management and strategic business partners. Painted with a broad brush, HR as a whole seems suggestible in its strategic views. This is indeed the result Rynes (2004, p. 207) lamented and about which Kochan (2004, pp. 135–136) warned a global audience.

Second, as reviewed earlier, Lengnick-Hall and Lengnick-Hall (1999, p. 44) proposed a model of business and HR strategy interdependence that graphically is similar to the stage three template we used. They posited demand for skills and employees made by the firm's competitive strategy and availability and readiness provided through HR strategy as both inputs to and constraints on one another. Our data do not suggest that HR practitioners note this strategic interdependence. Only three in eight respondents drew the key input

arrow from HR Strategy to Firm Strategy, and only about one in nine arrows that anyone drew extends as a right-hand influence on competitive strategy or any other left-hand element. In their views of formulating strategy, at least, HR practitioners do not identify true interdependence.

Third, if Figure 2 and its chiefly non-HR content were solely to guide us, we may conclude that HR's contribution to strategy formulation will be indistinct from the inputs of its strategic partners, as HR appears most to identify non-HR strategic forces. The subsequent contrast diagrams, however, suggest instances of subcultural differentiation, and HR's potential contribution to strategic planning now appears even more to be experience-dependent. The sparseness of Figure 2 and the robustness of Figure 4 most captivated us. The consensus view among practitioners with significant collective bargaining and labor relations experience was far stronger and more 'right-handed' than any other subgroup's. The



**FIGURE 7: CONTRAST DIAGRAM: CAUSAL ARROWS DRAWN BY SUBGROUPS, AS SORTED BY DEGREE OF BUSINESS OPERATING UNIT EXPERIENCE.** Notes. 1. Five bold solid arrows represent those drawn by at least 50% of the members of the focal subgroup only. 2. Three dashed arrows represent those drawn by at least 50% of the members of the non-focal subgroup only. 3. Nine thin solid arrows represent those drawn by at least 50% of the members of both subgroups. 4. Rounded decimal values arrayed with an arrow present the percentages of subgroup members who drew that arrow. Array order, business operating unit (focal) subgroup, then non-focal non-business operating unit subgroup. 5. n (subgroups) = 23 business operating unit, 24 non-business operating unit.

influence of American labor unions has decayed for decades, however, so it is a diminishing subgroup culture that holds what is perhaps the most viable employee-focused mental model.

In addition, labor relations experience and business unit experience lead to similar consensus models, both of which considerably exhibit right-hand or people concerns. Traditionally, no HR practitioners are more intimately involved with rank and file people issues and with daily operational concerns than are professionals in those roles, and such duties likely shaped their views. Conversely, the mental models of total rewards professionals and corporate staff exhibit more left-hand, non-people emphasis, as their work focus on programs and policies, remote from touch labor, may have influenced them. In this sense, we conclude that HR practitioners exhibit all three cultural paradigms that Martin (2002) identifies, and that elicitation of mental

models, cause maps, and career experience data through the methods developed and applied in this research has permitted these observations to be made readily.

Fourth, acceptance and implementation across firms of a normative call for HR strategic participation therefore may lead to uneven results. HR practitioners with certain backgrounds would be more likely to exhibit traditional perspectives on strategic planning, while others may voice a more people-issues view that may not always be heard at the table. Depending on what role general management seeks and expects from HR, this variability may lead HR's participation to be seen as distinctive and valued, distinctive and unwelcome, or redundant and unnecessary. The findings suggest criteria for promotability, or needed development opportunities, with regard to their HR talent. It seems less likely that a broadly normative call for HR's strategic participation is supportable.

## Practical implications

What implications hold for HR and general managers? American labor relations have a long, often confrontational history that is the subject of an extensive literature, omitted here. HR professionals are perhaps most tested in the crucible of collective bargaining, when planning for and pursuing a firm's strategic objectives while also responding to people imperatives voiced by its workforce and their legal representatives. The bargaining table indeed may serve as the best primer for the strategy table. The trail of ironies cannot be ignored: the most-shunned HR activity in non-unionized firms may be the one that would best position HR practitioners to make distinctive strategy formulation contributions, to be 'important'. Yet it is increasingly a dying breed of American HR practitioner who retains or gains this experience (so too in Great Britain – Machin, 2000), at least if and until the United States adopts pro-union card check legislation.

Yet American corporate leaders predict that such re-unionization will usher in a 'twilight of the goods', a further decline in American business competitiveness globally. If so, the labor relations experience that may make American HR strategically more vital may be short-lived: 'what does not kill me makes me stronger' (Nietzsche, 2005) – but only until it kills me later. Conversely, HR professionals trained in nations that enjoy more robust union representation patterns may be better able to make distinctive strategy-shaping contributions. This distinction may in the end be the comforting international reply to the concerns voiced by Rynes (2004) and Kochan (2004).

## LIMITATIONS AND FUTURE RESEARCH

Various decisions in the research design may affect its outcomes. We sought out HR practitioners across ranges of experience, environment, and organizational level, without regard to the size or complexity of the respondents' current employers, recognizing that most respondents have been shaped through work experiences with multiple employers.

In addition, this research did not aim to link respondents' mental models to performance in their jobs, or performance of their firms or HR departments. We did not investigate the views of executives and professionals outside HR, or other stakeholders, regarding their own strategic mental models or their views of the strategic worth of the HR function. The approach could serve to elicit any of these for fruitful comparison and intervention. For example, it may be applied in international contexts in support of 'strategic international HRM' studies (DeCieri & Dowling, 1999), recognizing that varied sets of most important strategic elements might have been learned in different regions. It may be useful in tracing unintended consequences over time of strategic HR actions like reductions in employee remuneration (Labeledz & Stalker, 2005).

Future research and professional development efforts that seek to identify, share and nurture a common mental map may increase HR's strategic worth. These efforts would make more visible the important causal influences that commonly result from and in turn affect HR practices, policies, and programs. If successful, the fundamental understanding of the human resource system thus shared may help to position HR more successfully as valued strategic contributors.

The comparison of strategic cause maps, independently developed and elicited, across members of corporate senior teams may identify further similarities in some other occupational subcultures (e.g., finance, product development) that span individual firms, or may discover more consistent views within certain organizations, whatever functional areas may have been asked to provide their cause map views. Thus this approach also offers promise, distinct from use in examining strategic mental models, for identifying organizational subcultures more generally. It is beyond the scope of this article to enter much into the discussion of hybrid studies of culture, but our approach has provided a flexible lens into multiple questions and levels of analysis which may readily be employed in other contexts by scholars or practitioners.



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