



# The role of front-line management in anti-unionization employee communication

## America West Airlines vs the Teamsters Union

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### Abstract

**Purpose** – The purpose of this article is to provide analysis of organizational communication used by one major US airline during a Teamsters unionizing campaign as a means for readers to examine what airlines do when faced with the threat of unionization, how they prepare front-line management for communication with employees, and what role these managers play in unionizing campaigns.

**Design/methodology/approach** – A range of corporate communications from the airline were gathered within a seven-month period and qualitatively analyzed, including management training manuals, e-mails, and conference calls between line managers and regional directors.

**Findings** – Anti-union communication strategies position front-line managers in the key persuasive role of controlling and disseminating essential top-down information in the effort to keep employees union-free, utilizing a complex and multi-layered organizational approach to train managers for employee communication during a unionizing campaign.

**Research limitations/implications** – While granted access by America West to observe conference calls and view internal documents the authors were not granted access to listen to Teamsters Union conversations or view Teamsters' internal documents. As a result, the authors realize that their study is limited to an analysis of only one side of the story. Additional research into this topic could include data from both campaigns.

**Practical implications** – Analysis of organizational anti-union campaigns and the role of front-line managers in these campaigns identify key areas of interest for both organizations and unions. This analysis, in conjunction with assessment of the overall results of a unionizing campaign, provides information that organizations can use when selecting strategies for internal communication in times of potential change.

**Originality/value** – This paper provides useful information about the complex function of line management in supporting and promoting the organization when external factors are perceived as endangering internal infrastructure. It also offers a practical glimpse into a unique type of managerial communication whose aim is to be both cautious and persuasive.

**Keywords** Trade unions, Airlines, Senior management, United States of America, Information transfer, Communication

**Paper type** General review

### Introduction and background

The US airline industry as a whole has survived many obstacles throughout the last few decades. Most notably, the events of September 11, 2001, and the significant



federal regulations and directives that came with it, gave the industry its most arduous challenge. Commercial air carriers, now put to the test in the post-9/11 landscape, collectively face a new set of external pressures that everyday bring the weaker carriers closer to the point of extinction. Additionally, however, carriers also bear “traditional” internal pressures, as changes occur within their individual infrastructures. In these cases, effective management and good communication practices can support the organization’s path to survival and continued success.

One such case occurred in the summer of 2004, to a major US carrier, America West Airlines. During this time, the International Brotherhood of Teamsters, commonly referred to as “the Teamsters Union,” made a bid on America West Airlines in order to hold an election that, if won by the Teamsters, would unionize America West’s 3,400 Customer Service Representatives, or CSRs (also known as passenger service employees).

America West Airlines had faced unionization a few years earlier, when in 2002 the Transportation Workers Union (TWU) made a bid to represent America West CSR employees. America West successfully rebutted TWU with an anti-union campaign. But an anti-union campaign against the Teamsters, what some consider America’s most powerful and most controversial labor union (Zeller, 1997; Brill, 1978), would prove a more difficult battle. Members of the Teamsters, an allegedly aggressive and highly proactive union, rallied at airports and in front of America West ticket counters. According to America West, Teamsters also allegedly interfered with the election process by talking to CSRs at employee parking lots, asking them who they were voting for, and by calling employees at home, sometimes late in the evening. This practice is called “polling” and is forbidden by the National Mediation Board, the federal entity that oversees unionizing campaigns in the USA. Bronfenbrenner and Juravich (1998) suggest polling is common in aggressive rank-and-file strategies. Also prohibited is any Teamster presence in America West workspaces during working hours, for the purpose of propagandizing.

This union election held high stakes for both parties. If they won, the Teamsters Union would gain approximately \$700,000 annually for dues and service fees from America West employees. If America West CSRs voted for unionization they would become the third major US airline with Passenger Service union representation. America West CSR employees represented by the Teamsters Union would be subject to Teamster’s terms, including dues and service fees, seniority-based schedules, vacations, assignments, and mandatory overtimes.

After the initial bid by the Teamsters to hold an election for America West CSR representation, the campaigning—and anti-campaigning—began. America West employees were hit from both sides, the company persuading them to “vote down” the Teamsters while the union attempted to win their vote. America West break-room bulletin boards hosted persuasive pro-company communication aimed at them, in the form of daily bulletins and “messages from Doug” (Doug Parker, CEO), asking them not to vote for unionization and why. Their home phones rang with persistent union callers at the other end. And so it went, for almost four months leading up to the actual election.

A key component of America West’s anti-union campaign is the important role played by its management teams in each field station (actual stations in each airport where America West operates, including hubs). Field stations are considered the front lines of the industry, the physical spaces where the action takes place and, most critical for Sunwest, where the company’s CSRs are stationed. Thus, field stations are at the

heart of the union battle, and the leaders in these stations are the principal advocates, enforcers, and activists for the organization. This article highlights how America West prepared its management teams for the anti-union campaign and for effective communication with employees during a Teamsters union-organizing campaign.

### Rationale and literature review

The dynamic and complex nature of the airline industry provides ripe examples of workplace communication, particularly in the area of management communication. America West Airlines, noted by *Time* magazine as “an innovative industry leader” and “among the best of the majors in on-time performance, customer satisfaction and baggage handling” (Donnelly, 2003), serves as a model for an effectively run airline, a feat not easily accomplished in the post 9-11 world of strict regulations and challenging economic conditions.

In particular, because of its recent involvement in the unionizing campaign and its strategies for preparing management teams for communication during a counter-campaign, America West Airlines presents a unique case for analysis. A great deal can be learned about how organizations face the external threat posed by unions and how they manage the internal challenges of launching effective anti-unionizing campaigns. While studies of anti-unionizing communication as it relates to the airline industry would be useful, a review of the literature reveals that research of this type is scarce. Most airline-related research, which is generally limited, centers on communication within the industry, mostly in areas of risk and crisis communication. For example, recent studies have tended to focus on the ways in which the airlines handle crisis communication. Strother’s (2004) work explores crisis communication as a teaching tool, focusing on strategies used in press releases from American Airlines and United Airlines in the first 24 hours following their planes’ crashes into the World Trade Center on September 11, 2001. Zoetewey and Staggers (2004) examine the case of the 2003 Air Midwest crash, studying the role of writing in the failure of technical systems. Rather than narrowing their lenses to look solely at management communication, these authors focus more broadly on the role ethics plays within airline communication to the public. In Cowden and Sellnow’s (2002) piece, the authors highlight the use of issues advertising as a form of organizational crisis communication, particularly in a crisis involving external and internal stakeholders.

Ray’s (1999) work also focuses on crisis management, but with a viewpoint that includes a systems approach. She argues that crisis should be understood as a system and that by looking at crises in terms of phases, we can better comprehend the numerous variables, characteristics, and events which influence the onset of crisis, its management, and its resolution. This understanding, Ray notes, is vital to crisis managers when determining strategic communication.

Other studies focus on customer service communication, such as Sanderson’s (2002, p. 4) study, which investigates external communication from airline customer service representatives to customers. The goal of that study was “to illustrate the value a communication perspective brings to the study of customer service in general, and airline service in particular”. While Sanderson focuses on the “actual communication processes or interactions that are taking place in the airline industry today,” she concentrates on customer-service related communication only (Sanderson, 2002, p. 23). Edvardsson (1992, p. 27) also explores customer service communication in his

investigation of service breakdowns. Describing these breakdowns as “critical incidents” he explains CIT (critical incident technique) as a tool that provides useful information about customers while at the same time involving staff “in further quality work”.

Additional studies shed light on other facets of the airline industry. Work by Taylor and Christensen (1998) explores airline maintenance resource management, with focus on communication problems particular to maintenance. Martin (2004) explores consumer-based news reporting during a flight attendant’s strike, and analyzes the role of media in influencing the public’s perception of labor movements. Chaison (2007, p. 653) provides useful analysis of how the confrontational collective bargaining practices of the airline industry are beginning to impact other industries, such as the automobile sector, because of intense competition, frequent bankruptcies, complex and fragmented bargaining structures, and unpredictable external shocks. Chaison identifies this phenomena as “a sign of a deepening crisis in union–management relations nationally” and identifies this as the first signs of a fundamental transformation in collective bargaining across industries.

Also important to the conversation in this literature review is research that highlights organizations and unionization in general. While subsequent literature focuses on industries other than commercial aviation, this research is highly pertinent in that it explores challenges and other elements associated to the organization-unionization dynamic. Certainly, Jermier *et al.*’s (1995) text *Resistance and Power in Organizations* serves as a key work in literature on organizations and unionization. Other studies include Green and McIntosh (1998) who studied the impact of unions on workers’ individual efforts. In his 1997 study of 95 workplace ethnographies, Hodson found that individual responses to the workplace were not largely affected by the presence of a union. Morrow and McElroy (2006) investigated the relationship between union instrumentality and union loyalty within the railroad industry. Milton (2003) researches unionization in the high-tech industry, an area where few unions (less than 2 percent in North America) exist. In particular, Milton uses theory and interviews to examine the motivations for high-tech workers to unionize.

Delving deeper into a variety of questions related to unionization, Blecher (2008, p. 266) explores the forces that led to Wal-Mart’s unionization of all its 66 stores in China given its militantly anti-union stance in the USA. Using Marxist frameworks, Blecher postulates that perhaps communist commitments played a role in the Chinese state challenging “the world’s most prepossessing corporate giants” to unionize in order to appease the working class. Additionally, Blecher raises important questions about the true impact of such unionizations on Chinese workers, i.e. are they empowered or co-opted, and how will such unionizations affect future labor relations in China. Blecher’s research provides a useful comparative reference point for studying global unionization issues and how they influence transnational organizations, particularly powerful and seemingly ubiquitous retailers like Wal-Mart.

Additional research related to unionization, such as Lafer’s (2008, p. 73) study, examines “behind the scenes” issues such as the effectiveness of election procedures of the National Labor Relations Board (NLRB). Lafer argues that these procedures “fall dramatically short of American standards defining ‘free and fair’ elections”. In particular, Lafer analyzes how the Employee Free Choice Act, which mandates union recognition based on signed statements from a majority of employees, rectifies some of the problematic aspects of current NLRB practices. Ultimately, Lafer concludes, “it is

unionization itself – not the process through which employees choose to form a union – that creates lasting democratic practices within the workplace” (Lafer, 2008, p. 94). Lafer’s research is significant in that it depicts the voting process used during the Teamster’s drive for unionizing America West CSRs. Employees who voted for the union were asked to vote by secret ballot but did so by calling a designated number via telephone, entering a personal identification number (or PIN) and casting their vote.

The research cited above provides an introduction to several issues that impact the airline industry. However, as is apparent by the brevity of this literature review, none of the studies reported in the literature have closely examined what airlines do when faced with the threat of unionization, and most importantly, how they prepare management teams in the front lines for communication with employees who would be affected by unionization. Missing from current organizational communication literature in general is a clear understanding of the role that managers play in unionizing campaigns. These are the issues that drive our study. Our intent is to explore how America West Airlines prepared its field station managers and leadership teams for communication with employees during the Teamsters unionizing campaign. Furthermore, Eccles and Nohria (1992, p. 211) note that an effective view of management must focus on three issues: “the use of rhetoric to achieve a manager’s goals, the shaping of a managerial identity, and taking action to achieve the goals of the organizations that employ us”. Thus, we also question and analyze how these issues manifest themselves in America West’s oral and written management communication initiatives during the organization’s anti-union campaign.

A study of this nature is important, first of all, because it provides us with a real-world understanding of the challenges that organizations face when threatened by unionization, and how they use communication to confront these challenges. From this study we can also glean useful information about the complex function of line management in supporting and promoting the organization when external factors are perceived by management as endangering the organization’s internal infrastructure and *modus operandi*. Additionally, exploring America West’s management communication strategies during its anti-union campaign adds to our knowledge of legal liabilities and what can and cannot be said during a campaign of this nature. Thus, the America West case offers a practical and valuable glimpse into a unique type of managerial communication whose aim is to be both cautious and persuasive.

A useful backdrop for analyzing this unique type of managerial communication is provided by Gray (1986, p. 96) who notes that “the primary responsibility for organizational climate belongs to line management, from the chief executive officers to supervisors”. Thus, to contextualize the analysis that follows, we apply Gray’s notion that line management performs a key function in maintaining organizational climate, particularly when change threatens that internal climate. Also useful as context for our study is Gray’s notion that the complex function of line management in times of crisis must include fostering an environment of open communication based on trust and confidence, as it is “one of the most effective ways of promoting healthy employee relations” (Gray, 1986, p. 93). Therefore, our analysis will also explore to what extent, if at all, America West was able to foster open communication in its employee relations during the unionization campaign.

### Organizational structure of America West Airlines

To demonstrate the role of management at America West and highlight the consequences of unionization, the following section includes background information on America West's organizational structure. Because an organization's unique context helps to shape the particular methods used to observe and study a setting and the theoretical underpinnings of those methods, we include this information before presenting the theoretical framework and methodology for our study.

As a part of the airline industry for more than 20 years, America West is the nation's second-largest low-cost carrier, with 97 destinations and 900 daily departures. Serving over 55,000 passengers daily, America West's annual revenues are greater than 1 billion.

Out of America West's 14,000 employees, approximately 90 hold positions as station managers. Station managers are responsible for managing daily operations in one or more cities. Each station, or city team, consists of the station manager, several supervisors, and varying numbers of support agents in passenger and fleet service. When we talk about "leadership teams" that means the field station manager and the station supervisors who help him or her run the operation in that city.

At the time, America West had approximately 3,400 customer service representatives (CSRs), according to company literature related to the anti-union campaign. These employees, who have been union-free during their history with the company, work in Airport Customer Service and Baggage Service. At hub airports they handle reservations, customer relations, and tour sales.

Another large portion of the America West employee base at the field operations level is comprised of fleet service agents, also known as "rampers" within the industry. These employees load baggage and cargo onto the aircraft, restock aircraft supplies, refuel aircraft at hubs, and guide the aircraft to and away from the jetway after landing and before takeoff, respectively. These America West employees are unionized as are the majority of fleet agents in the industry—only one major airline in the USA, Frontier Airlines, has union-free ramp employees and only one, Jet Blue, is completely union-free (Chaison, 2007, p. 644).

With so many unionized workgroups represented within the airline industry, a fundamental question arises: why do airlines, America West in particular, want to resist unionization? The answer seems to have a great deal to do with control and flexibility. With unionization come strict guidelines and protocols that organizations must follow when managing every aspect of employees' working conditions, including but not limited to issues of pay, seniority, vacation, work conditions, and work schedules. Although organizations play a role in negotiating these guidelines and protocols, organizations must often, especially after long negotiations, compromise or make concessions that are, from a company standpoint, considered unfavorable—although some, like Chaison (2007) would argue that the opposite is true and that it is unions that are pressured to concede to unfavorable terms in concessionary bargaining or risk job loss. Moreover, unionization diminishes employer-employee negotiation flexibility by imposing a third party into the mix and by putting in place a stringent and rigorous grievance process, mediated by outside parties, for resolving issues related to all of the above work-related issues. In the case of America West in particular, opposition to unionization may have also been fueled in part by the organization's previous experience fending off a unionization bid.

Thus, having already succeeded once against unionization by the Transportation Workers Union, the organization now faced the threat of a Teamsters bid. With such a formidable opponent, America West needed to launch an aggressive anti-union campaign in order to convince employees not to vote for Teamster representation.

### **Theoretical framework and methodology**

#### *Theoretical framework*

Managerial communication and persuasion deal with influencing employee behavior, requiring that managers create a motivation for employees to change behavior or conform to desired behavior (Thomas, 2004). This involves establishing credibility, which as Thomas points out, is often impacted by a person's rank and his or her perceived expertise. Hovland *et al.* (1953, p. 19) agree that "the effectiveness of a communication is commonly assumed to depend to a considerable extent upon who delivers it" and what the expertness and trustworthiness of that person is. The issue of credibility is significant in the case of America West station managers, given their vital role within the organization's anti-union campaign and their operational position within the company's infrastructure: most station managers have been with the company for many years, some as long as twenty years). Often, managers have climbed up the corporate ladder and have functioned in many roles, including CSR positions – the same position held by agents targeted in the unionizing campaign. Thus, most of them are highly credible and enjoy the professional respect of their employees, suggesting that America West station managers are in a beneficial position to persuade employees as credible proponents of the organization's anti-union campaign.

To analyze the communication strategies that America West uses to prepare its managers for the anti-union campaign we must first consider the importance of organizational culture, and most significantly, how outside researchers can adequately observe and interpret that culture. A useful tool for such a task is Geertz's (1973, p. 14) interpretive ethnography approach, an approach that the researchers determined to be best suited for the level of access they were permitted and the kinds of research questions they asked. For Geertz, culture is fundamentally interactive and should be thoroughly interpreted not simply casually explained. His notion of culture as context for "thick description" provides the inquirer space to construct an interpretation of the meaning-making processes of the people he or she studies. Doing so, according to Geertz, leads to an understanding of the meaning that particular social actions have for the people who enact them, and of the culture in which these actions are found (Geertz, 1973, p. 27).

The "social actions" or forms of communication in a particular culture serve as symbolic representations of that culture. Thus, also useful to our analysis of the America West case is Bazerman's (1994) notion of symbolic representations. Bazerman emphasizes the role of symbolic representations – whether linguistic, visual, or mathematical – in fostering "intersubjectivity," the shared understandings within a culture which are necessary for productive intellectual collaboration, thereby "providing shared information, perception, orientation of large numbers of people engaged in coordinated activities" (Bazerman, 1994, p. 146-7). Creating intersubjectivity through symbolic representations, particularly in large, hierarchical organizations requires what Hutchins (1993, p. 290) calls "the division of cognitive

labour” on behalf of more senior decision makers. This is the case with America West’s organizational structure, where line management in the field stations works on behalf of the executive administrators to exhort employees away from unionization.

Finally, because the America West case – like all other cultures – involves an underlying notion of individuals who do or do not consider themselves as “belonging to the group” and sharing the values and attitudes of that culture, it is also necessary to address the issue of norm acceptance and conformity, given that this is a key objective in the America West anti-union campaign. According to Hovland *et al.* (1953, p. 136) norms are “the standards shared among the members of a group and representing the behavior and attitudes they expect of one another”. Conformity of a group’s members, Hovland *et al.* posit, “results from a complex social process which includes teaching them about the norms, motivating them to conform, and in various situations, providing reminders of the norms and the associated sanctions” (Hovland *et al.*, 1953, p. 136). One of the motives involved in attitudinal and behavioral conformity to group norms is to share in the group’s solution to recurrent problems and by doing so, maintain social approval and security within the group (Hovland *et al.*, 1953, p. 137). Conformity brings the individual to accept the values and opinions of the group, and the group becomes more important as a “refuge from external dangers” (Hovland *et al.*, 1953, p. 138). This notion of “refuge from external dangers” plays a significant role in America West’s anti-union campaign, where the company attempts to thwart the election of the Teamsters, which can be viewed as an “external” threat.

#### *Methodology and description of study*

The authors conducted this study over the course of seven months during which time they collected a variety of qualitative data, each of which served as a tool for building a thick description of America West’s organizational culture. From April to October of 2004 America West granted the authors permission to sit in as observers on conference calls pertaining to the anti-union campaign and collect and copy corporate communication documents including e-mails and training documents. The authors took extensive notes during the conference calls and performed analyses on all of the documents for which we were granted access. Guiding the analysis was what Smart (1999, p. 271) describes as “the practice of using discipline-specific tools, concepts, and procedures to interpret empirical phenomena”. In particular, the authors were looking for rhetorical strategies used to communicate information to and from America West management as evidence of the types of exchanges that create Bazerman’s (1994) notion of intersubjectivity within America West management structures. Consequently, similar to Smart’s (1999) study of “storytelling” at a central bank, the symbolic representations contained within America West documents and conference calls highlight the field-specific discourse and “professional vernacular” of America West’s organizational culture and provide evidence of the collective formation of norms and goals within this organization. The aim of the authors was to identify, analyze, and interpret these exchanges as a way of understanding how America West prepared its management teams to play an important communicative role during a Teamsters unionizing campaign.

Because “union tactics and activities are central to the organizing process” (Bronfenbrenner and Juravich, 1998, p. 33) the company anticipated a considerable challenge that could be met only with an equally aggressive and proactive anti-union campaign by America West. Managers in the front lines became the designated



gatekeepers and “watchmen” ready to confiscate Teamster literature (considered propaganda by the company) or dispel “misinformation” about the issues involved. The company used both oral and written communication to prepare its station managers for the counter campaign; the key venues for management training and preparation were instructional and informative conference calls and written manuals/e-mails.

Beginning in April of 2004 and ending in August of that year, the authors sat in on six conference calls where America West executive officers and field station managers convened to prepare for, discuss, and examine the company’s anti-union campaign and related issues. Thus, the purpose of the conference calls was to:

- Introduce station managers to the management training manuals and explaining how they should use them. Each station manager received a copy of the manuals through co-mail (internal mail that arrives to each city on America West flights from hub/corporate headquarters) at his or her field station.
- Emphasize strategies for proper communication with employees and provide training and Q&As regarding what can and cannot be said during a union organizing campaign.
- Emphasize activities and information that pro-union America West employees are and are not allowed to bring into the workplace.
- Discuss “what’s going on system-wide” during the campaign. That is, what reports the company has received from field stations about the tactics the Teamsters are using (rallies, approaching employees in parking lots, picketing at airports, bringing Teamster propaganda into the workplace, etc.) so that other cities can prepare a defensive strategy in case it also occurs in their stations. These calls include discussion of airport resources to contact for policies, regulations, and support if such incidents occur.

From April to August of 2004 the authors also collected internal America West documents pertaining to the Teamsters Union campaign. Of these confidential documents, two e-mails and two training manuals were directed specifically towards managers. One of the e-mails was from the VP of Customer Service and the other was from the VP of Human Resources/Human Legal Compliance. The training manuals are titled *Manager’s Manual for a Union Organizing Drive* and *America West Customer Service Management Training 2004*. These documents, while they covered similar issues as the conference calls, were presented in a highly detailed manner. The information presented was extremely thorough, and the overall tone of the documents was very formal. The purpose of these documents was to:

- Provide, in writing, policy statements and Q&A guidelines for managers to follow. Managers were given general rules to follow when communicating with employees and when discussing topics related to the Teamsters Union drive. Possible questions employees would ask were anticipated, with scripted answers included.
- Display several detailed charts regarding Teamster representation in other labor groups as well as other air carriers. These charts helped to emphasize that the length of time it takes to negotiate initial Teamsters contracts is extensive.
- Remind managers of legal implications of not abiding by NMB (National Mediation Board) policies.

The authors base this analysis on several factors inherent in effective communication. Primarily, they “assume that acceptance (of persuasive communication) is contingent upon incentives” and “a major basis for acceptance of a given opinion is provided by arguments or reasons which, according to the individual’s own thinking habits, constitute ‘rational’ or ‘logical support for the conclusions. In addition to supporting reasons, there are likely to be other special incentives involving anticipated rewards and punishments which motivate the individual to accept or reject a given opinion” (Hovland *et al.*, 1953, p. 11). The authors explore these patterns as an actual strategy for training used by the company to prepare America West managers for the unionizing campaign.

### *Limitations*

Before presenting the subsequent analysis, it is necessary to note that this study is not without limitations. While the authors were granted access by America West to observe conference calls and view internal documents, they were not granted access to listen to Teamsters Union conversations or view Teamsters’ internal documents. As a result, this study is limited to an analysis of only one side of the story. Nevertheless, the authors feel the emphasis of this research is significant because it warrants analysis and interpretation of two lines of rhetoric—the rhetoric the company imparts to managers exclusively, in written materials and conference calls as part of their preparation for the anti-union campaign, and the rhetoric intended for employees, contained within the former. This factor impacts this study in that language must be analyzed on two levels:

- (1) America West’s confidential instructional information for managers; and,
- (2) information contained within the managers’ communiqués, designed by America West as “trickle down” information, for managers to discuss or pass on to employees.

Thus, America West’s management communication case presents a complex challenge for analysis. In addition, this study is limited to analysis of “instructional” information given to managers. Therefore, missing from this research is any impression or insight into how managers felt about the communications they were instructed to carry out or, similarly, how employees impacted by the communications perceived it. The authors can, however, draw conclusions or extrapolate about the impact or effectiveness of the communications, given the eventual results of the union election.

### **Analysis**

Reviewing the content from the conference calls and the internal documents to managers revealed several trends in regards to the organizational strategies used to train managers to handle communication during the Teamsters Union campaign. It is important to note that, as in most cases leading up to an election, campaigns of any type seem to focus not only on promoting self-virtues but also on denigrating or casting doubt on the opponent. Such appeared to be the case in the America West anti-union campaign, as will be evidenced in the subsequent sections that describe how line managers were prepared for employee interaction during the campaign. In these sections, the Teamsters are portrayed as aggressive propagandists, and unionization is illustrated as undesirable. What follows is a description and analysis of the significant

trends and organizational strategies used by America West Airlines in the preparation of its line management teams, with examples taken from both conference calls and written America West communications.

*Placing America West managers in a prominent proactive role*

America West's strategy to fight unionization involved making front-line management teams part of essential communication in the effort to keep CSRs union free. America West managers were reminded again and again of the importance of their role in the Teamsters Union campaign. In its communication with managers, the company seemingly imparts a great deal of power to these front-line managers. As an April 20, 2004 memo from the VP of Human Resources states, "ultimately, it is you who has the ability to make the greatest difference." The last passage in the *Manager's Manual* reminds managers that "you are the Company".

Station managers thus become advocates, enforcers, and activists for the organization, charged with several responsibilities.

*Monitoring the workplace for teamster propaganda or activity.* Several conference calls discussed Teamster activity at airports system-wide and ways in which managers should prepare for similar occurrences in their cities. Managers were asked to contact their local aviation departments to determine the legality of such Teamster activity at given airports and how local airport authorities might play a role in suppressing such activity if necessary. In conference calls, managers were also asked to monitor the presence of Teamster propaganda at work. Any flyers, banners, or other propagandistic materials promoting the Teamsters were to be confiscated. Pro-union employees would only be allowed to wear a Teamster pin no larger than one inch around.

The written documents that managers' received as part of their training for the anti-union campaign also gave instructions on how to deal with Teamster propaganda and activity. For example, the *Manager's Manual* points out that "employees are free to discuss the union campaign with other employees during lunch periods or breaks, but under no circumstances may union campaign activities interfere with work. Union organizers (whether employees or non-employees) may not approach employees who are on work time or in work locations." Similarly, the *Customer Service Management Manual* states that managers should "prevent company facilities, including mail, e-mail, telephones and company records, from being used for organizing purposes" and "refuse to allow non-employee union organizers access to Company property at any time."

*Clarifying "misinformation" about what the union can and cannot do for employees.* In conference calls and written manuals managers are asked to "Tell employees the facts" which includes correcting misleading statements made by the Teamsters or which appear in flyers, websites, letters or other literature distributed by the union organizer. Managers are also given the onus, when necessary, of reminding employees what they will lose as a result of unionization. This message is manifested throughout the documents in countless statements such as the following, which is found in the *Customer Service Management Manual*:

[...] if a union represents [you] conditions of employment will depend upon what is negotiated for an entire group of employees and [you] will lose your right to deal directly with management in such matters.

The *Manager's Manual* also instructs managers to be prepared and proactive about responding to “misleading statements” and “set the record straight.” It then goes on to provide key points that managers can invoke in conversations with employees about unionization. Managers may engage in such conversations given that under section 8(c) of the National Labor Relations Board, organizations’ free speech is protected, along with their freedom to make “predictions” of adverse consequences of unionization (Drummonds, 2007, p. 218).

*Maintaining an open-door policy for communication with employees so they can “get the facts”.* Continuously, managers are reminded that, as the Manager’s Manual states, “employees must have all the pertinent facts” and that the managers themselves are charged with the responsibility of providing these facts in an accurate and careful manner. The *Customer Service Management Manual* reiterates the notion that “America West is committed to proactively communicating with employees on the subject of unionization so that they are able to make an informed decision.” This manual also emphasizes that talking to employees should not be limited to group meetings and assures managers that “it is perfectly legal to speak one-on-one about the union” so long as the conversation is voluntary on the employee’s part:

All of the preparatory information given to managers, via documents and calls, gave a great deal of attention to the important role that managers should play in open communication with employees. Several calls strongly encouraged managers to proactively engage in conversations with employees whenever possible and “maintain an open-door policy” to answer questions about unionization. An e-mail from the VP of Customer Service sends managers a similar message, asking them and their leadership teams to “stay positive and continue to encourage our agents to ask questions and seek out the truth [because] if they are informed, they will choose America West.

*Promoting the virtues of the organization in comparison to what teamsters can offer.* From the outset, on page one of the *Manager's Manual*, station managers are assigned a monumental organizational task:

You are responsible for stating in a positive manner the Company’s position in order for employees to hear both sides of the story, not just the union’s position.

In the written documents as well as conference calls, managers are asked to promote the benefits of being union-free and remind employees of what the company has already done for them. The *Manager's Manual* and the *Customer Service Management Manual* both stress “the positive side of not being bound by union rules or rigid union contract” and go on to give specific evidence regarding dues, third-party negotiation, and issues of flexibility, information that managers can use to make a persuasive case for what the company can offer that a union cannot. The VP e-mail also asks managers to promote “the differences between promises (Teamsters) and commitments (America West) and asks managers to remind employees about what the company has already done for them, regarding benefits and other issues that are of importance to the quality of employees’ lives both in the workplace and outside of it.

In essence, evidence from conference calls and management training documents suggests that part of America West’s training strategy for anti-union communication includes enabling station managers to act as diplomatic but proactive persuaders, making them responsible for controlling and furthering the company’s ethos in the minds of the CSR employees targeted by the Teamsters.

*Controlling information flow*

While America West managers were repeatedly told that they had a great deal of responsibility, Human Resources maintained strict control over information to the extent where America West managers were instructed in the April 20, 2004 HR memo “do not answer questions (from employees) unless a script has been provided to you, except to tell the employees that you will get back with them to answer their questions.” While managers were reminded of the power of their words, the ability to use those words was restricted. For example, the *Customer Service Management Manual* that managers received as preparation for the anti-union campaign includes many statements that control information flow, such as the ones highlighted here:

As part of this communication program, each manager is permitted to hold voluntary meetings with his/her employees . . . However, do not call employees into an office or any other type of closed-door session for this purpose . . . because the NMB prohibits management from holding any type of mandatory meeting to discuss unionization.

Similarly, the *Manager’s Manual for a Union Organizing Drive* instructs:

Make certain that any statements concerning unions are authorized by management, are accurate, and are consistent with the Company’s position.

In this manual, many of the sentences highlighted under the section “Communications with employees” begin with statements such as “You may discuss”; “You cannot say that”; “Do not tell employees that”; “You may tell employees that”; “Do not ask employees.” Again, this strongly suggests that despite the prominent role given to managers during the anti-union campaign, the organization maintained strict control over the information exchanged between managers and CSRs at the front-lines.

The effort to limit or control managers’ ability to speak to employees about the union campaign was an example of the cautious sort of communication America West employed throughout the campaign. Such cautious communication ensured the consistency of management’s responses. As primary communicators for America West during the campaign, managers were trained that consistency would help prevent infractions of NMB regulations and reduce the likelihood of the Teamsters being able to accuse America West of campaign infractions.

*Projecting corporate optimism as a strategy for communication*

During the conference calls and within the documents there existed a distinct tone of self-assured corporate optimism. Interspersed within procedural information that instructed managers how to act and restricted responses to employees were positive messages intended to project confidence in America West’s ability to win the fight over the Teamsters Union. The Senior VP’s July 27, 2004 e-mail to managers began by stating “we are doing just fine” and shared his belief that “our people will decide to stay with management.” At the end of the lengthy America West *Customer Service Management Training Manual*, procedural information is followed with the phrase “We are building a winning airline by taking care of our customers.” This phrase, appearing as a soundbite slogan incongruous with the rest of the information contained in the manual, serves as a final attempt to sprinkle optimism among strict instructions for managers. Another way that the sense of optimism is conveyed is through constant reminders that employees will be “taken care of.” The VP continues in an optimistic tone, “You know that I care a great deal about all of our people, and in

my heart of hearts, I am much more confident of our ability to take care of our agents better than any one else, particularly the teamsters.” These messages, phrased in an almost paternalistic vein, appear several times throughout the e-mail from the Senior VP and could be heard repeatedly in the conference calls. In part, these messages demonstrate the VP’s appeals to pathos; by sharing his sentiments with employees, he hopes to evoke an emotional response, one that may inspire loyalty to America West.

The written documents given to managers also share this feature of self-assured corporate optimism. For example, the *Manager’s Manual*, with a high level of confidence, asserts:

The company believes that union representation is not in the long-term interest of our passenger service employees.

It goes on to state:

Outsiders have nothing new to add about the actions that are necessary to ensure that the Company is competitive in today’s market. We further believe that all employees should consider the long-term disadvantages of unionization, and decide for themselves whether the intervention of a third party in their relations with management is necessary and advantageous.

Similar sentiments and statements are also expressed and implied in the *Customer Service Management Manual*, providing self-assured and optimistic forecasts about the company’s superiority over unionization and its ability to lead successfully without a union such as the Teamsters.

#### *Teaching managers to play defense*

America West managers were painted pictures that depicted the amount of power they would lose if the Teamsters Union won their campaign, and this loss of power would translate into harder work for managers, more challenging union-based communication, and loss of negotiating power with employees. Used as a strategy to motivate managers to step up to the task of defending America West and equipping employees with correct information, Human Resources and high-ranking corporate officials within the airline used language that underscored just how much the Teamsters would take away. As the Senior VP’s July 27, 2004 e-mail told managers, one of the losses would include flexibility: “Flexibility will give way to rigidity . . .”

Managers were equipped with plenty of information including scripted answers to questions, facts about the Teamsters Union and their representation of other airlines, and “correct” and “incorrect” actions and responses. The *Customer Service Management Manual* alone includes detailed charts to illustrate that the Teamsters have only represented labor groups (mechanics, fleet workers) in minor airlines, and have never before represented CSRs in any major US airline. This manual also provides numerous factual cases that managers can use to persuade CSRs not to vote for the Teamsters, describing previous cases where other airlines were extremely dissatisfied with Teamster’s representation and had a very difficult time ousting the this union. Armed with this information, America West managers not only had a strong defense, but they also had the tools for using logos as a rhetorical strategy to persuade employees not to vote for the Teamsters.

*Destroying ethos of Teamsters Union*

Within the *Customer Service Management Manual* several negative scenarios and pieces of information concerning the Teamsters Union are presented. This derogatory Teamster information is included strategically in the company's written documents as well as in the conference calls to help managers realize how important it is to defeat the Teamsters, and how to use the "history" of the Teamsters against the union itself. The ethos of the Teamsters Union is called into question repeatedly. Managers are warned that Teamsters can put members who do not follow union rules on trial and that at trials members cannot choose their own lawyers. Managers are provided with past examples of unscrupulous practices by the Teamsters Union, including corruption and kickbacks. Jimmy Hoffa Jr.'s name is mentioned more than once, the strategy here being a reminder of the connections between the Teamsters Union and other renowned groups whose ethics were allegedly questionable. In addition to these examples appearing in America West internal documents, America West managers were given copies of past newspaper articles depicting Teamsters' illicit practices. Managers were instructed to display these newspaper articles, focusing on the inflated salaries of high-ranking union officials and on disreputable practices such as picketing in cemeteries, in visible places at work such as the breakroom tables, where employees couldn't help but notice them (MSNBC News Online, 2004').

**Results/discussion**

The primary responsibility for organizational climate belongs to line management, from the chief executive officers to supervisors (Gray, 1986, p. 96).

In the case of America West's campaign against the Teamsters Union, the above quote is certainly true. As our analysis indicates, the strategies used by America West to train managers and ensure that employees who would vote for or against the union had sufficient and correct information, involved careful control of organizational climate. To ensure that this climate was one in which employees would recognize America West's attempts to satisfy employee needs and concerns, managers were tasked with monitoring the organizational climate and making sure it was based on "feelings of trust, confidence, and openness" (Gray, 1986, p. 96). Such monitoring was achieved in part through open communication, noted by Gray as "one of the most effective ways of promoting healthy employee relations" (Gray, 1986, p. 93).

With their open door policy for communication with employees, America West provided a means for employees to "get the facts," while at the same time promoting the virtues of the organization in comparison to what the Teamsters could offer. The company trained managers to serve a binary persuasive function where they controlled and promoted the company's image while casting doubt and negativity on the ethos of the Teamsters, a plausible tool for persuasion given the historical and current controversy surrounding this union. Zeller (1997, p. 357), a personal advisor to four Teamster presidents, argues that "Many workers... resent the lavish lifestyles of their union bosses and have become more outspoken about it in recent years, complaining that their leaders are out of touch with the working people they purport to represent. Thus, America West managers became proactive leaders and persuaders, disparaging the Teamsters, extolling the virtues of the company, and using their own ethos and credibility as a tool for influencing the outcome of the union election.

In their multipurpose role, managers were responsible for responding to negative inferences about the company and monitoring the workplace for nonverbal actions that threatened organizational climate, a practice that requires careful evaluation since “our confidence often exceeds our ability when it comes to accurately interpreting nonverbal cues” (O’Rourke, 2004, p. 213). Managers had the responsibility of responding to employee concerns or comments via “open communication,” using carefully constructed Q&A scripts strategically provided by the company. Prior research suggests that this Q&A strategy is valuable because it helps to “close the distance between managers and subordinates...[and] demonstrate that the boss is open to communication.” Q&A sessions also “provide an excellent opportunity to correct misunderstandings and deal firsthand with substantive issues” (Gray, 1986, p. 100). In the case of America West Airlines, the substantive issue was unionization. Furthermore, open communication with employees appears to be an effective strategy because additional research suggests that internal public affairs regarding productivity management, healthcare cost containment, absenteeism and union prevention and decertification are now more than ever becoming open topics for discussion between management and employees, where “management is listening to employees and involving them in the real decisions facing the organization” (Gray, 1986, p. 96).

Additionally, as indicated by content from the conference calls and identified in passages from the texts, America West managers were trained in the context of corporate optimism. Such optimism was used as an important strategy in their preparation, and as a prominent factor in managers’ communication with employees, to create a patriarchal sense of security and trust in the company. In contrast, managers were encouraged to use “threat appeals” as part of a defense strategy in their communication with employees. Such appeals “allude to or describe unfavorable consequences that are alleged to result from failure to adopt and adhere to the communicator’s conclusions” (Hovland *et al.*, 1953, p. 60). For example, continuously reminding employees of the negotiation flexibility they would lose with unionization or of the fact that they would have to pay dues determined by the union serve as persuasive threat appeals in favor of the organization.

Overall, America West’s aggressive strategy to fight unionization placed front-line managers in the key persuasive role of controlling and disseminating essential top-down information in the effort to keep CSRs union free. The trends revealed in the content of the conference calls and the internal documents underscore the complex and multi-layered organizational approach used by America West to train its managers for employee communication during the Teamsters Union campaign.

Underscoring the company’s approach, according to our analysis, is Bazerman’s (1994, p. 146-47) notion of intersubjectivity (discussed in the theoretical framework section) which considers the shared understandings within a culture as necessary for productive intellectual collaboration, thereby “providing shared information, perception, orientation of large numbers of people engaged in coordinated activities”. As stated earlier, creating this intersubjectivity, particularly in large, hierarchical organizations requires what Hutchins (1993) calls “the division of cognitive labour” on behalf of more senior decision-makers. In the case of America West’s organizational structure, line management in the field stations work on behalf of the executive administrators to exhort employees away from unionization.



**Conclusion**

According to Drummonds (2007, p. 218), unions typically lose slightly over half of the elections conducted by the NLRB under section 9 of the federal act. That was not the case with America West and the Teamsters. In August of 2004, the Teamsters Union won the majority by a small margin of 4 percent of the vote. Of the 3,100 CSR employees who voted, 54 percent (1,669) voted for Teamsters Union representation. Post-vote discussions amongst America West and management, via e-mails and a conference call, thanked managers for “fighting a good fight” and noted that the determining votes for the union came mostly from one or two of the company’s large hubs rather than the individual field stations in each city, suggesting that managers system-wide had done an effective job persuading employees against unionization during the company’s anti-union campaign.

There was also informal discussion, in the post-election conference call, about external factors beyond the control of the company and outside of the scope of the internal anti-union campaign that may have played a role in the outcome of the election. Such factors discussed included the aggressive – and often forbidden (according to the company) – campaigning tactics of the Teamsters’ mobile rank and file: calling America West employees at home, visiting them in the workplace during work hours, following them to their cars in employee parking lots while persuading them to vote for the union, giving employees misleading information about the voting process, picketing at airports and propagandizing against the company by means of these venues. These points raised in the conference call suggest that some members of management believed that Teamsters resorted to unethical tactics in order to confuse, mislead, and ultimately persuade employees to vote for the union.

Because of the scope of our study, it is difficult to support with certainty any of the conjectures drawn by company management as to why the Teamsters won the election. We can, however, make some informal suppositions based on what we observed in the communications, particularly the conference calls. During several of these calls, there were substantial reports by station managers of pervasive union activity at their airports (America West locations). In some cases, Teamsters were allegedly picketing legally (with airport’s permission) while in others, Teamsters were allegedly approaching the airline’s agents illegally (for example, at ticket counters during work hours or calling their homes). Additionally, as reported in conference calls, although such “propaganda” was forbidden in the workplace, a considerable amount of pro-union literature was making its way into America West break-rooms and employee mailboxes. Finally, results of the election showed that the majority of pro-union votes came from the company’s Phoenix hub where, allegedly, most employee groups (including the customer service group that voted) are significantly dissatisfied with the company. All of these factors, if accepted as valid informal observations by the authors, suggest that the Teamsters are a highly proactive, well-funded and widely diffused organization that managed to persuade employees (particularly those in larger hubs) through strong activism and persistent mobilization and not solely through rhetoric or persuasion contained within its union literature alone.

Evidence from conference calls also underscores the important communication role of management within the organization. Content from these calls suggests that a great deal was expected of these frontline service managers in the company’s field stations who, it appears, are regularly asked to carry out internal communications of this importance and magnitude. On various calls, regional directors and other headquarters

personnel such as human resource or employee relations representatives referred to station managers as “gatekeepers” and “first responders.” This implies that because of their prominent position as leaders to those employees who would eventually decide the outcome of the election (CSRs), the role of station managers in communicating for the company was considered integral to the success of the anti-union campaign against the Teamsters. And the methods for training managers reflect an organization whose culture seems to range in its levels of formality; yet, it can seem quite formal when regulatory issues, such as those contained in the training manual are put into play.

In conjunction with content from conference calls, moreover, subject matter contained in some of the company’s written documents used during the anti-union campaign also reveals what may or may not have been learned in previous unionization drives. The organization, while aware of the mobilizing strength of the Teamsters, seemed confident given its previous victory against the Transportation Workers Union. Based on the dates of some of the company’s anti-union campaign literature used during the Teamsters’ drive it appears that the company adapted older materials (such as talking points, scripts for managers to use in communications with employees) from previous anti-union campaigns originally targeted at other unions like TWU. These internal documents were used concurrently with new campaign materials specifically for and about the Teamsters anti-union drive. This suggests that the company followed a two-pronged approach in selecting its anti-union training documents, choosing both new material, tailored to the Teamsters’ drive, as well as previously used anti-union literature.

These informed assumptions present a rich area for future research where new studies could explore how internal anti-union communication is chosen as well as what external factors may influence the intended outcomes of that communication. Moreover, additional research in this area could focus on what organizations can learn from failure. In the case of America West, for example, there are various lessons learned, areas for improvement, and best practices that can be taken from this case and applied generally to any organization facing similar union challenges. These are summarized as follows:

- Training documentation, such as the manual used for managers, is an essential tool for educating employees in management positions of the regulations that frame internal unionization communication. Such documentation is also key in helping managers structure Q&As, talking points, and interpersonal sessions with employees in order to discuss issues related to the anti-unionization drive.
- If an organization has various branches that are diverse in location, size, and workgroup subculture, the effectiveness of the “one size fits all” approach should be explored before launching an anti-unionization campaign tailored generally to all employees. In cases such as that of America West, perhaps a communication approach that closely targets each station via individualized appeals, while still sharing certain standard features uniformly for all audiences system-wide, would be most beneficial.
- Also important is the need to understand the larger context for even the most meticulously planned internal communication, a context that is often out of the control of organizations. Thus, organizations should not overlook the relationship between internal communication and external forces that may impact its effectiveness; nor should they underestimate the power of external forces.

For intensity and complexity, there is nothing quite like airline labor relations... negotiations are nearly always extremely contentious [and] airline bargaining structures are complex and highly fragmented with a number of occupational units and varied degrees of unionization (Chaison, 2007, p. 643). Perhaps this is why organizations such as America West resist unionization, though they often fail. Yet, regardless of the union election outcome, this America West case depicting managerial communication during an anti-union campaign can teach us a great deal about organizational communication. There were various elements of the company's communications that were useful and could be very effective teaching tools. Primarily, the America West case furthers our understanding of the challenges that organizations face when threatened by unionization, and teaches us how they use communication to confront these challenges. From a study of this nature we can also learn about the complex and essential function of line management in supporting and promoting the organization when external factors endanger the organization's internal infrastructure. Additionally, exploring America West's management communication strategies during its anti-union campaign increases our knowledge of legal liabilities and what can and cannot be said during a campaign of this nature, providing a valuable and practical glimpse into a unique type of managerial communication whose aim is to be both cautious and persuasive.

Returning now to Eccles and Nohria's (1992, p. 211) notion that an effective view of management must focus on three issues: "the use of rhetoric to achieve a manager's goals, the shaping of a managerial identity, and taking action to achieve the goals of the organizations that employ us," we can see in the America West case that all three initiatives manifested themselves in the company's oral and written management communication during the organization's anti-union campaign. Managers used language to shape their own identities and functions within the campaign—as proactive leaders/persuaders/gatekeepers. Managers also strategically used their position to push the goals of the company – dispelling Teamster "myths" and promoting a culture of self-assured corporate optimism. These initiatives seem to be an inherent and deliberate part of America West's training strategy for managers, given the presence of these initiatives in the company's anti-union documents and conference calls.

Finally, the America West case directs our attention to the general importance of effective internal communication between management and employees. As Gray (1986, p. 95) points out, employees are "the bearers of internal corporate image [who] directly reflect the corporation and carry the corporate message to the business community and other vital publics". Thus, maintaining "healthy" communication with employees is vital not only to the internal workings of the organization's infrastructure but also to the organization's external ethos and the public's perception of the organization. The role of front-line managers is key in cultivating this type of employee/corporate communication. Given their vital role within the organization and their operational function within the company's infrastructure, most front-line managers, particularly within challenging industries like commercial aviation, share the trenches with employees. As a result, many have earned the professional respect of their employees and have the ability to influence employee behavior to meet or maintain organizational goals. As the America West case suggests, however, professional respect and open communication between management and employees is not always enough to ward off external phenomena that threaten to change the internal structure of an organization.

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