

### Department of Sociology



#### **On-Line Papers – Copyright**

This online paper may be cited or briefly quoted in line with the usual academic conventions. You may also download them for your own personal use. This paper must not be published elsewhere (e.g. to mailing lists, bulletin boards etc.) without the author's explicit permission.

Please note that if you copy this paper you must:

- include this copyright note
- not use the paper for commercial purposes or gain in any way
- you should observe the conventions of academic citation in a version of the following form:

Peter Tolmie, John A Hughes, Jon O'Brien and Mark Rouncefield, 'The Importance of Being Earnest: everyday managerial work in financial services', published by the Department of Sociology, Lancaster University, Lancaster LA1 4YN, UK, at http://www.comp.lancs.ac.uk/sociology/papers/Tolmie-et-al-The-Importance-of-Being-Earnest.pdf

#### **Publication Details**

This web page was last revised on 17th December 2003; the paper was previously published at http://www.comp.lancs.ac.uk/sociology/VSOC/ImpEarn.html in 1998

# The Importance of Being Earnest: everyday managerial work in financial services

## Peter Tolmie, John A Hughes, Jon O'Brien and Mark Rouncefield

#### Introduction

This paper presents some initial findings from research on middle managers in a retail bank which has been undergoing major organisational change. Like many other financial institutions in the UK, and elsewhere, the Bank has implemented a transformation of the 'traditional' organisation of banking services. This was primarily intended to enable the organisation to become more competitive. However, it also aimed to align it with perceived developments in managerial philosophies, technological infrastructure, modern working practices, and increasing competition in the financial markets. To meet this competitive challenge the Bank saw a need to move the organisation away from its traditional, predominantly 'administrative culture' and towards what it regarded to be a modern 'service and selling culture'.

The strategic plan the Bank developed was implemented in various ways: through a general and comprehensive restructuring that involved the centralisation and standardisation of processes; and through more experimental and radical modes of business. The most significant organisational development was the centralisation of various aspects of its 'back office' processing and the creation of specialist centres such as Lending Centres, Service



Centres and Securities Centres, all servicing 'high street' Customer Service Branches. It is against this backdrop of ongoing centralisation and standardisation that this study has been conducted.

Financial institutions have long been in the forefront of the use of distributed computer systems and have recently begun to explore, in conjunction with the sorts of major organisational changes outlined above, the increased use of IT to support decision-making, quality control, and customer services. These systems are intended to facilitate shared work across the organisational divide - that is, 'virtual teamwork' in which organisational function or process is more important than organisational location. The organisational objective for the Bank was the replacement of administrative structures with the flexibility of task-oriented teams which could bring skills and expertise together as and when required. A further outcome of this was projected to be the development amongst workers and managers of a new variety of skills, competences and responsibilities.

Notions such as 'virtual teamwork' are associated with the now much-hyped concept of the 'virtual organisation' (Davidow and Malone, 1992). Such organisational forms, it is claimed, address major transformations in the social, economic and technological environment in which organisations operate. These 'virtual' organisational arrangements consist of networks of workers and organisational units, linked by information technology in order to give co-ordination to their activities, combining their skills and resources to achieve common goals.

Just as organisations are perceived to have changed in response to technological developments so, too, have the associated skill requirements. Zuboff, for example, writes of new forms of organisational behaviour "in which relationships are more intricate, collaborative and bound by mutual responsibilities of colleagues" (Zuboff, 1988, 6). In a similar fashion Casey (1995) detects the development of new forms of teamwork, "in which people share knowledge, skills and resources and work co-operatively in the manufacture of their products... Relationship to a product, to team family members and to the company displaces identification with occupation and its historic repository of skills, knowledges and allegiances." (Casey, 1995, 109). Such teamworking, "less fettered by the constraints of traditional hierarchies and spheres of responsibility, engenders a heightened sense of empowerment, commitment and collective responsibility" (Casey, 1995, 45). This sort of analysis clearly impacts on various debates on 'skill' but such diagnoses of organisational change need to be subjected to close empirical examination. Other views are considerably less sanguine about the consequences of technological change and more sceptical about the likelihood of such a transformation in teamworking, skill, identification and empowerment (Kunda, 1992). As Ducatel (1992) writes: "The absence of an a priori direction in which the technology will take organisations makes the empirical investigation of how computer network technology is being implemented of the utmost importance and urgency." (Ducatel, 1992, 166).

Managerial work is frequently characterised as serious, earnest work with managers spending their days pondering weighty matters and making important decisions. And, in the context of the Bank, it is very often the managers who have effectively become the locus of organisational change. They are the ones who have to implement the new proposals. They are the ones who have to negotiate, day in, day out, ways of making changes work in the context of their ongoing routines. They are the ones who have to balance and resolve at a practical level the tensions involved in reconciling the centralisation of processes with the decentralisation of customer service; the centralisation of administration and record keeping with the decentralisation of 'selling'. The detailed study of middle managers we have been conducting therefore offers an opportunity to subject some of the claims made about virtual organisations to the sort of close empirical investigation that Ducatel proposed - especially with regard to the ideals of 'virtual teamworking' and 'virtual teams' - not to mention a chance to scrutinise the earnestness of managerial work.

#### The Ethnographic Work

The central feature of the method deployed in this study - ethnomethodologically informed ethnography - is the immersion of the researcher in the work setting under investigation in order to uncover features of the sociality of work and its organisation; how the work 'gets done'; the conversations, gossip and asides; the interruptions and mistakes; the details of the



how the paperwork and computer work are practically accomplished as part of routine, ordinary, taken-for-granted, 'real world' work activities. The understanding of the accomplishment of work is consequently closely tied to, 'grounded in', the detailed observations and data derived from the work setting itself. The justification for the use of this method in the study of work lies in the recognition and explication of the variety of tacit skills and co-operative activities through which work is accomplished and in making these processes and practices 'visible'. Its focus is to understand the situated character of work, that is, the work seen as a practical production by social actors performing their activities within all the contingencies of local circumstances. The method seeks to preserve and portray the variety of activities and interactions that comprise the 'workaday' of working life and the ways in which these are understood and accomplished by those who do that work. Consequently, while ethnography is frequently caricatured as simply 'hanging around' a worksite - and much of ethnography does indeed involve 'hanging around' - this is not its point but a means of achieving the objective of uncovering the sociality of work.

The managers who were the particular focus of this study were individually 'shadowed' over a lengthy period of time in order to achieve a fine-grained or 'thick' description (Geertz, 1973) of their activities and interactions as they went about their everyday work. Each of the managers chosen was the manager of a particular unit in a particular location as opposed to an area manager or above. An immediate consequence of this is that the managers we observed were specifically responsible for actualising externally dictated decisions and changes 'on the ground', hence our suggestion that it is such managers in particular who become the locus between ongoing change and everyday routines. It is the aim of this study, then, to provide an in-depth understanding of the ways in which strategic plans can come to be instantiated in the day-to-day working practices of middle managers. Along the way we also hope to highlight important issues concerning our understanding of the everyday accomplishment of managerial work in highly distributed organisations.

#### Where Numbers Speak a Thousand Words

One of the immediately striking features of work in the bank is the facility with which individual members will arrive at 'the meaning behind the numbers'. A standard device in referral (the bringing of individual cases to a manager's attention because either there is some problem or the amount involved is beyond the power of that member of staff to handle) is the negotiation between the manager and the member of staff concerned, through and around the use of particular computer screens, of just what story it is that the numbers tell, as detailed in the following abbreviated extract from the fieldnotes:

L.OFF. Are you free for a referral?

MGR. Yeah, by all means

L.OFF gives MGR. scribbled notes on sheet

MGR does ISS Inquiry - Brings Up an 836 [[This is a computer screen that effectively displays a synopsis of an account's activity in terms of limits and the maximum and minimum figures held in the account per month for the past 6 months]]

MGR. Sorry, you're going to have to interpret this note for me

L.OFF. Yeah (.) It's all on there basically (.) Risk Grade 9 (.) Just started a new job

MGR. Right

L.OFF. Been bumming along basically (.) working in TOWN

MGR. ((scrolls through as they talk - interprets figures on screen))

Not a particularly wonderful er (.)

L.OFF. Exactly

MGR. Profile

L.OFF. Exactly



Department of Sociology at Lancaster University

MGR. ((works through screens))

Outside debts fifteenth of January (.) This is a problem of course isn't it (.)

We don't actually know what we're getting ourselves into here (.) It might be his three weeks rent or it might be part of his five thousand with some guy who's knocking on his door wanting a hundred quid a week

[for the next]

L.OFF. [That's right yeah] That's right

MGR ((carries on looking through screens))

It's going nowhere this is it

MGR The thing is we're on notice that he's got at least five thousand pound of debts in the background so (.) and we're on a Risk Grade nine so we can't reschedule

L.OFF. mm hmm

MGR. internally (.) so even if his job does sort himself out it's going to take him a while anyway coz some other people are at him for five grand so we're probably not going to see (.) much benefit of that are we?

((Goes To Customer Interview Notes))

Discussion re procedure

((836 Screen - MGR Relevancing))

So this was previous employment was it or? (.) ((using cursor to point tofigure on 836))

L.OFF. That's right I forget who he said it was he worked for in TOWN

MGR. That (.) increase to eight fifty was (.) for this very reason wasn't it?

L.OFF. Mmm that's what I queried him over but he says it was increased to that to cover his rent on his flat (.) up to the fifth of March because he had to pay rent up front I think to the fifth of March

((MGR changing screens - ISS - Customer Notes: Synopsis - Interview Notes - MGR. does ghost juggling))

L.OFF. Yeah it is isn't it

However, it became quickly apparent that just what a set of numbers might mean was not something that was just being used in relation to customers but rather something that was being applied in increasingly sophisticated ways to staff and teamwork as well. In the following extract the Manager of a Monitoring and Control section of a Lending Centre is discussing backlogs and work for the day ahead at a meeting with the Team Leaders in the section. Throughout the meeting he flicks through various Excel Spreadsheets on his computer, making reference to figures that the Team Leaders have entered into these the previous evening (they are on a shared drive for the office):

MGR Right (.) Backlogs (.) We're all in, thank you very much (.) MAC one half (.) nothing very exciting there one assumes how is NAME doing?

TL Fine

MGR Excellent (.) and your Personal people?

{{Lending work in the bank is currently divided up between Personal accounts and Non-Personal accounts - in Monitoring and Control this was more a matter of classification than of any significance for the apportionment of work between teams}}

TL Errm (.) NAME managed to (.) do the ()

MGR Good

TL I'm calling NAME in to help with the eights because there's two hundred and thirty three lines today and she's not going to cope

{{the eight is a computer printout that details all of the accounts that are currently 'out of order' in some way}}

MGR Right (.) Two hundred and thirty three (.) total lines of eight is that?

TL No, Personal

MGR Really? God, that's high

Perhaps as a consequence of the shift towards more distributed co-ordination and a perceived reduction in the opportunity for managers to know exactly what everybody is up to 'on the ground', there is a growing emphasis in the bank on producing detailed information about what people are doing, what they are capable of, and what they have achieved. In a number of the field sites this 'Management Information' was being systematically gathered by the managers and collated on Excel Spread Sheets and Word Documents into 'products' that they referred to generically as 'M I Packs'. The sorts of information contained in an M I Pack might be things like: Financial information such as arrangement fees for certain months, refunds, provision-loss figures and amounts transferred to their Insolvency and Debt Recovery Department; Internal Quality information such as staff utilisation, processing standards and risk management; Customer Information such as sales performance; and Organisational Development information such as their own performance in dealing with and completing A and Ds (Appraisal and Development Reviews).

The rationale behind gathering such information is not always as clear cut as it might seem. Frequently the perceived objective was to provide information for, say, the overall Manager of the Lending Centre so that he in turn could use it as a basis for negotiation at some higher regional, or even central level:

X & Y have gone upstairs to the 12th floor to 'get some quiet' and avoid interruptions whilst they devise a 'Management Information Pack' that can be used by the Manager of the Lending Centre at a meeting at Regional Office next week. The manager has already, in a previous managers' meeting, forcefully emphasised the importance of this information and of the time frame within which it has to be produced ("Can you produce it by Monday?" "Well,.." "No, I said can you produce it by Monday?" "Yes").

However, it was also drawn on as an justificatory or rationalising document in the managers' own A and Ds:

{The Manager of the Sanctioning section of the Lending Centre is on the phone talking to the Manager of the Phones section}

MGR ..tchh yeah (.) I'm just up to me eyes in it (.) w- what's not helping is like ((cough)) y'know, tryin to pull stuff together for me A and D and then tryin t- and then all these other things y'know on the er (.) on this errm (.) on this projects list we've got (.) erm (.) y'know tryin to pull th- that together and

then we've got (.) y'know a loada different process changes on the go here

(.) er y'know, tryin t'do process maps and all this that and the other so erm

I'm just (1.0) so:: i'm just (2.0) well yeah y'know just strugglin a bit at the

minute (4.5) well err:: (.) w- (.) well umm that's my day today (.) All I'm doing

today is ermm (.) someat like stuff off this project list and ermm (.) me M I for tomorrow

In other contexts managers were often observed to show one another parts of their M I Packs and enter into discussions about what they were doing and whether they were doing it in more or less the same way. Indeed some of the basic document layouts in Word and Excel were passed from one manager to another via e-mail. Not that this proved to be unproblematic. During our observations the Manager of the Sanctioning section of the Lending Centre received a telephone call from the overall Manager of the Centre who was



unable to return to the office that day, He was asked to ensure that a comprehensive M I pack be put together and got to the Centre Manager that evening so that he could have it in readiness for a meeting in London the following day. The Manager of the Sanctioning section advised other section managers of the need to do this then spent the rest of the afternoon chasing around staff and putting together something on the basis of what he understood to be the conventional format. Upon completing this exercise he took printouts of all the relevant documents to the Centre Manager's office to insert them in the M I folder. While doing this he glanced through the materials that had been submitted by other managers and realised that they had worked up their own formats rather than using one like his. The point to observe about this is that even when the managers sought to achieve standardisation in their production of Management Information, it required as much co-ordinated negotiation and achievement as any other task. Left to their own devices and put under pressure managers resorted to producing the information according to their own understandings, competences and relevances with the end result being that on some occasions no two packs would look even remotely the same.

Of course, as we have already seen in the use of Management Information in the context of a Team Leaders meeting, information that is gathered under an M I rationale can be, and often is, directed back to staff further down the managerial scale in order to simultaneously assess performance and to propose ways of doing. In this way materials that are primarily intended to be representations of the work that people do - virtualised manifestations of the teamwork one might say - can become themselves implicated in a number of complex ways in the actual achievement of that teamwork from day to day.

For instance, at a practical level Team Leaders use the 'REs' - measures of the 'reasonable expectancy' of the time it takes to complete a task which support a number of the elements of the Management Information - primarily as a means of estimating the actual man hours involved in handling work as it comes in. This is then used to guide the apportionment of work. In that case any discussion of backlogs and quantities of work processed in a management meeting, using Management Information, has implications not just for the understanding of what the figures mean, but also for the further application of those REs. And necessarily this will be impactful for the future practical distribution of the work.

All of the above reveals the extent to which Management Information is not something that unproblematically resides within the computers, to be accessed at the simple push of a button. In fact Management Information is something that has to be worked up and achieved in a rich interweaving of computer-based materials, paper documentation and physical noting down and drawing, and a great deal of talk, involving many tacit social competences and activities along the way. The following extract demonstrates some of these practical, everyday activities being brought into play:

Y is talking about what management information is required and looking at a handwritten outline of the kinds of categories and calculations he thinks they should include. On one sheet of paper he has written a number of ideas; 'non-utilisation periods', R/E (reasonable expectancy) how many calls could we have taken?', 'what does the productivity gap equate to in man hours', speed/quality/control', industry comparisons' and so on. On another he has divided the sheet into columns as the precursor for producing a spreadsheet. Heading the columns are categories such as 'calls offered', 'staff required for 100% calls handled', 'staff required for 90% calls handled'. A series of comments are written down the side - these are later to form the basis of their discussion - 'figures as at certain date with customer base of X'; 'do subsequent charts/spreads for take-on of Centres for rest of year multiplying calls offered by factor of X (customer base in future divided by customer base now'; 'when new 'actuals are obtained from future ACD information revise figures for comparisons and compare to model'; 'do we want to put in model numbers of staff to see divergence?'. A final sheet has a complicated calculation by which they might obtain a measure of effectiveness.

Whilst this is going on X is looking at the BBS (Balanced Business Scorecard) as it will be important that the measures reflect elements of the BBS both for the section and him personally and at a basic set of management information spreadsheets that



they produced last week for the managers' meeting which forms the basis for this current MI pack.

Y uses the computer to get an Excel spreadsheet on screen - 'AOBT accuracy' (advice of borrowing terms) - they then chat about the layout of the spreadsheet. The talk centres on how much information they need to display and how to present it; the emphasis is on 'totals', totalling columns because "... all he'll (the Centre Manager) be interested in is that (pointing at total)". They then work together setting up the various 'macros' (calculations) for the various parts of the spreadsheet, talking about its use for making predictions with the suggestion that "that would be good for 'Hours by Design'"(a new initiative on hourly working within the Bank). They then turn to the MI figures they produced last week - "these are great . . . but I think we need the graphs and a comments box . . . he (the Manager) doesn't need all that (the detailed figures)". They then use the computer to access the spreadsheets they produced last week - unfortunately they do not appear to be in the folder and drive they expected - "where are they?...its a bit of a bugger when you cant remember where you kept it..".

Centrally, then, we can see how all of the management information - whether it is being used to account for particular situations, to justify certain decisions, as a basis for rationalisation, or as a means of arriving at some sort of assessment - relies on an underlying assumption that workflows and work activities are ultimately reducible to figures. However, just what these figures amount to is far from self-evident so the M I becomes effectively a resource for discussing and arriving at some sort of understanding of what it is we are doing, other ways of doing it better, and just how good what it is we are doing might be. In other words by transforming everyday working phenomena into numeric depictions, the persistent variability and unpredictability of those phenomena can be eliminated. Real teams, subject to the everyday vagaries of working life, are in this way transformed into 'virtual teams' within the machine, open, just as in Lynch's observed mathematization by scientists of 'recalcitrant, "naturally occurring" phenomena' (Lynch, 1990), to standardisation and mathematical operations that can inform some understanding of 'the way things are' as anyone else like them, working in a bank and doing the activity of 'lending', might well understand it. And it is through such shared depictions of the work they are doing that some sort of common-sense understanding of what 'lending' might amount to is arrived at and can be oriented to.

Not that managers laboured under any illusion as to the possibility of there being some disparity between the figures and what actually occurred. As one manager readily admitted "it's not rocket science". Instead M I was one way in which managers sought to practically achieve the much vaunted principle of standardisation and to arrive at practical decisions as to how to mete out between real teams and team members the ongoing influx of work. And, of course, this in turn could become a resource for the discussion of other issues such as performance and staffing.

#### **Process Modelling and Process Maps**

Another managerial preoccupation that came to light in the fieldwork, especially in the new Lending Centre, was that of process modelling and the production of process maps. The Lending Centre in question is currently taking on the work of a number of somewhat smaller Lending Centres throughout the North West of England in one large centralised unit that is spread over three floors of a modern office block. The objective was claimed to be one of ensuring that, for every single process the bank engaged in, there would be a process map so that anyone could come in and do the job in exactly the same way as anybody else. Clearly the backdrop to this objective is again the drive towards standardisation. However, the interest of process maps in the context of the Lending Centre is the tremendously rich way in which it facilitated co-ordination and was itself open to far from standard, and frequently ad hoc considerations.

The very newness of the Lending Centre (it was the first centre of its kind to go 'live' in the Bank and still has a long way to go before all of the smaller Lending Centres have 'migrated' into it) meant that a disproportionately large amount of management time was concerned with discussing just how to make something like this sort of Lending Centre work. In practice, when a manager worked on a process map, it was far from immediately obvious to him how the process map might connect up with other parts of the Lending Centre. Within the Lending Centre itself there was a basic division of labour between the three floors along the following lines: 'Monitoring and Control' where there was a basic processing of various printouts relating to the current status of loans and overdraft facilities etc; 'Phones' where most incoming calls to the centre from the customers were fielded and where staff might have to deal with anything from a request for a loan to a complaint; and 'Sanctioning' where requests for loans etc were either approved or declined.

In one example the manager of the Sanctioning floor was overviewing the production of a process map by two of his staff. The process in question was a complex one regarding how to eliminate or reduce the level of 'hard-core' debt run up by customers using a certain kind of Credit Card, while simultaneously turning it into an opportunity for what was effectively 'a sale' by offering the customers loans to clear the debt. In order to achieve this overseeing facility and the production of suitable advice, the manager in question was obliged to physically visit the managers of both the Phones and Monitoring and Control floors in order to discuss the best way to lay the process map out. In this way we can see how the activity of process modelling becomes a means of arriving at some sort of appreciation of the work of other people who also have a part to play in the processes in which individuals get involved. And, significantly, it also becomes a vehicle for the articulation between the various parts of the Lending Centre at a time of experimentation and change, with much of that being achieved in situations of physical co-presence, as the situated product of interaction and talk.

However, it is not always the case that this need for awareness of the work that others may do is apparent to the staff who are involved in process modelling. In the case of the example already cited one of those involved had already been taken to task by the manager for the absence of such a consideration:

{Sanctioning Manager in a meeting with a Team Leader in an Interview Room}

MGR What he did, he had a word with NAME and took her process map, and

tailored her process map to suit his circumstances and to be honest it was

just totally (.) .. and I'm going to be 'avin' a word with 'im errm becoz err (.) he er (.) he annoyed me shall we say ... on er on Friday, so I'm going to have a little word in his shell-like (.) just to put 'im right errmm but (.) what he was like (.) er what he was doing was errm (.) gettin on his high horse like he does .... and how he was tacklin' it was he was just looking after (.) y'know, what it was he had to do and I think as well (.) the way th - (.) what he thought was expected of him (.) y'know h- he h- he just wouldn't let go (.) coz he was

sort of "oh it's nothin t'do wi them up there" says "all I want is a list from them and then we'll send the letters out (.)and then err and then we'll give the list to the phones" an I said"well where d'the phones come into this?(.)Why are you givin' this list t'the phones?" "Well so they can phone the customers up" "oh no matey (.) that's your job" ... an what I wanted him to do was to

come up with a process map t- t- (.) to cover MAC ... what do MAC do? ...

then what was the next stage (.) y'know (.) w- what did phones need

t'know? right (.) becoz they're gonna get the phone calls I- if any of these

letters have gone out (.) phones are goin' to get these these calls aren't

they?"

And the steering of the staff involved towards such an appreciation became the main preoccupation of the manager throughout the rest of the activity. The difficulty of obtaining this extended perspective was put down by the manager to the legacy of staff coming into the centre from other smaller centres where they would have once overseen the whole process rather than just a small part of it.

The interest in this is the implication it carries for the achieved collaboration of work over a distributed division of labour. But, as important is perhaps the way in which it reveals the

pragmatic concern managers are exhibiting with encouraging an awareness of the work of others as one of the important elements in 'making a place like this work'. And, in the sense that the process map implicates non co-located workers, it becomes another means of achieving some sort of fit between what might be seen as 'the virtual team' - that is the team constituted by the whole Lending Centre - and the individually realised everyday routines that make up the actual work that they experience.

And we can also see how it is that something like a process map is not something that is simply a logical representation of the best way of achieving some particular end but is rather something that is the negotiated product of individual perspectives and experience. In other words, at least in the context of the Bank, a process map is not something that is simply a definitive consequence of the rational deduction of processes and implications but is rather something that is to be collaboratively achieved in situated interaction, with all of the here-and-now preoccupations that the parties to it bring to bear. And so, to extend upon Suchman's observations regarding the situated and contingent realisation of 'the sense within the plan' (Suchman, 1987), we might further observe that the very making of the plan is a situated and contingent affair.

#### Monitoring, Updating and 'Cascading'

As already noted, one of the assumptions apparently underlying the emphasis placed on gathering Management Information, and to a certain extent within the delegation of process modelling tasks by the manager so that individual teams can tell him what it is they do, is that the ordinary everyday affordances of the modern workplace are no longer providing managers with the means to assess at a glance the nature and the quantity of the work their staff do.

We have already seen the pragmatic use of Management Information in the context of certain kinds of decision-making and accounting activities. However, managers will also draw on other far less formalised resources as a matter of course in the conducting of their everyday work. And the affordances of more traditional means of keeping up with the work that your staff do clearly remain and continue to be exploited.

Some managers continue to see their own location within the office as central to the activity of monitoring , not to mention the physical location of team leaders in relation to their teams as well:

{Manager talking about the way he is not happy with the layout at one of the two Lending Centres he is responsible for - saying about instances regarding need for team leaders to be able to actually 'see' the things members of their team are doing}

MGR very difficult for a team leader (.) a team leader wouldn't have know about that (.) coz they couldn't(.) it wasn't easy(.) they had to physically get up and out of their chair and walk across the room to be aware of what was actually (.) happening on the desk wasn't the work but y'know (.) they couldn't just look up whereas here...

The same manager also considered it important to monitor the work of staff by doing 'walkarounds', and indeed was witnessed to put this policy into practice by going around the desks to see how people were doing as a matter of course before leaving the office at lunchtime, and wherever practicable, when he first returned from being 'out'. In his words:

"One of the things that management's about is getting up out of your chair and wandering around and actually seeing what is going on out there (.) and there's no substitute for that"

And, of course, the local knowledge obtained through such informal activities is as much a resource behind decision-making as anything else. In the Calls Centres of the bank, for instance, it is observable that, despite the use of relatively sophisticated monitoring software, the bald figures produced by these need considerable interpretation before they can have any value as 'Management Information'. So, for example, one manager pointed to some of the figures produced and said:

"his % time was low because he kept wandering round the office...I came in with a ball of string and tied him to his chair...his times are better now"; "her time on the phone was low because she came in and then went out to work with another team"

or, when commenting on the figures for grade of service:

" we try to keep it above 90% .. last Monday it fell to 72% - ... - three staff were on holiday and three were sick .. we couldn't answer the phones any quicker"

Having said all this, it would be wrong to propose that the achievement of physical monitoring and walkarounds of this kind is necessarily something that is consciously brought about. Sometimes information that comes out of informal 'chatter' can prove to be of strategic value. An instance of this was the proposal by one manager that one of the younger members of staff's absences seemed to be frequently coincidental with his parents going away for a few days and him having the house to himself - a proposal that the manager suggested the Team Leader pursue by examining closely the dates of that member of staff's absences.

Indeed, most often it would seem that monitoring is something that is actually incidental to other activities, particularly activities such as updating, 'cascading' and advising which demand that managers physically move about not only their own offices but other co-located offices and floors.

Updating, advising, 'cascading' and monitoring are activities which are hugely intertwined. For instance advising someone may well amount to updating them as to the state of play now and what is therefore necessary, and in the process of doing that a manager will be able to notice what it is that someone is currently doing. The distinction between these different activities really lays in the level of priority attached to the information, the extent of its relevance, and the projected way in which the recipient will engage with what is said. Updating is an essentially unpredictable and contingent activity because it amounts to the passing on of information relevant to others in some way, as and when it comes to hand, and to be used in whatever way they see fit:

Manager answering telephone - speaking to the Liaison Officer in the Business Centre - turns to his trays to look for something then turns back and apologises picks up his Post It Notes and writes in black "Been to the Service Centre" - tears the note off the pad and puts it in his briefcase - turns back and concludes the conversation...

Manager dialling out to Assistant Manager at the other Lending Centre he is responsible for - advises her that the Inspectors are going to be in the Business Centre upstairs from her next month - reports conversation he has had with the Liaison Officer about the Service Centre...

And it would seem that this sort of information gets delivered as and when the opportunity to pass it on may arise:

Team Leader goes to see one of her team before she returns to her desk in order to pass on the message she got about the phones team - expands on it - catches another team member to pass on the same message as he passes by on the way to his own desk

Advising and instructing tend to be somewhat more focused activities. When instructing managers have to seek out those who they need to instruct because the activity always has a very specific relevance to someone (or some group) in particular. Hence a part of the process modelling scenario that we looked at previously was the obligation upon the manager to go and visit the members of staff involved and instruct them with regard to the next stage as soon as he had himself clarified it. Advising, by contrast, is very much a here-and-now and prompted activity. Advice is sought in the form of a question and the advice or inability to provide it then and there is always something that has to be produced immediately in a

response to that question (for a general outline of questions as the first part of an adjacency pair and the accountable need to produce an answer as the second part of that pair see Heritage, 1984).

A frequent term employed by members in the bank is 'cascading'. You will hear higher level managers direct the managers of units to 'go and cascade that to your staff'. And you will hear the unit managers direct Team Leaders to 'cascade' certain information to their teams. It is a term that is largely reserved for information that is of general relevance to everyone in a unit rather than for specific individuals. There are weekly communications meetings for most units in the Bank. But information that needs to be cascaded usually has a fairly immediate priority attached to it, though what actually gets cascaded might be solely information or it might amount to highly specific edicts, instructions and advice. In one particular instance the manager of the Sanctioning section in the new Lending Centre was asked during his A and D with the centre manager to ensure that all of the individual teams within his section were producing Balanced Business Scorecards (the document that effectively set out particular targets and achievements to date) as well as the one he was producing for his section as a whole. The Centre Manager told him to 'cascade' this to his staff. And, of course, in order actually achieve such 'cascading' the manager was effectively obliged to circulate amongst Team Leaders, instructing each of them in turn.

Occasionally, of course, the opportunity to 'cascade' to everyone simultaneously is made or will arise. One particularly potent instance of this was the announcement of the date of 'migration' (closure from the point of view of the staff involved) for one particular satellite Lending Centre into the new centre that was being set up. The manager concerned was at pains to time such an important announcement correctly. The chief orientation exposed here was towards ensuring that everyone did, indeed, know about it at the same time. He had been told that the staff in the Service Centre in the same building (which was also 'migrating') had already been given their date. He was therefore under some pressure to make an announcement quickly before hearsay came into play. However, the situation was made difficult because at any one moment there were always a number of staff on the telephone. He therefore had to continually monitor the office for 'a quiet moment'. On one occasion he stood up and moved to the centre of the room to call everybody to attention only for the phones to all start ringing again. Under the circumstances he went away and sat back down. Five minutes later things had quietened down a bit so he went returned to the centre of the room and managed to get the announcement made.

The key thing to observe about all of these different communication activities is perhaps the extent to which they require managers to physically move about their offices, and there is little to suggest that technological or organisational changes are making much difference to this. And the ramifications of that for the constant updating of managers' local knowledge and the opportunity for contingent diversions to arise are substantial. So the communication practices between management and staff actually serve to facilitate many of the refined decisions that managers will make. For all of the models of the teams in the machine there is far more to making a decision than just arriving at something self-evident within the numbers. Indeed, as has been amply demonstrated, it is locally acquired knowledge of what the staff are really doing that often provides for the understanding of just what it is that the numbers mean.

And so, when it comes to managing some sort of fit between 'virtual teams' and 'real teams', situated, contingent and local knowledge becomes a vital resource and a primary 'skill' for managers (so much as one can distil such a thing from its context) resides in the efficacy with which they achieve that 'fit'.

#### Checking the Checking and 'Overview'

For some of the managers we observed a substantial proportion of their time was effectively dedicated to checking over the work of other people in order to make sure it had been done correctly, according to bank policy and guidelines. They then had to complete documentation that amounted to a certified statement that the checking had been done. Frequently for the manager of a unit the checking would be a sample check or 'overview' of checking that had already been carried out by Team Leaders, hence one manager's comment:

SCM Now what I'm doing here is a check of a check of a check

Many of the managers expressed the view that this amounted to a 'checking culture gone mad', though they sympathised with the bank's need for caution. One manager suggested that the basis of this caution was historical. At the first shift towards streamlining in the bank and the introduction of more centralised units - not to mention the accompanying emphasis on a 'selling' rather than an 'administrative' culture - some of the original checking was 'done away with'. This, however, had led to a number of mistakes, some of them very public ones. Consequently checks had been reinstituted with considerably more thoroughness, and most of this work had been directed at the higher grades, particularly Assistant Managers and Managers of units. As another manager put it when talking about the completing of Credit Forms "p.a.'s not good enough any more". And ensuring that corrections to mistakes of this order are made is a routine part of a manager's everyday work.

Whatever their individual feelings about these checking requirements, for most managers it constitutes a large part of their dedicated time and they feel they have little choice but to get on with it. The manager who provided the view above estimated that something like forty percent of his time was spent in doing checks. The actual activity of checking was hugely routine and repetitive, though much of it implicated a complex interweaving of computer and paper records, as the following extract shows:

{Manager of Lending Centre Doing Overview}

Back to desk - does ISS Inquiry - driven by 008s

Interview Notes - appending comment in synopsis

Amending 008 - signing

Next 008 - initials and passes to stack

Next 008 - signs - stacks with others on desk in front of him

Next 008 as prior

Next 008 - longer - reads in more detail - signs - appends comment - puts to stack

Next 008 - Initials - does ISS Inquiry - Customer Notes: Synopsis - Interview Notes - appends comment in synopsis "Any future returns RD Please - UNSATISFACTORY ACCOUNT OPERATION" - signs - puts to stack

Next 008 - signs - puts to stack

Next 008 - initials - longer - initials in four other places - signs - puts to stack

Next 008 - initials - signs - puts to stack

Next 008 - as prior

Next 008 - longer - puts to the right

So far as each individual Team Leader's pile of documents for overview was concerned they amounted to a statement to the effect that 'everything in my team is in order' or else that 'there have been problems but they are under control'. The job for the manager then became what amounted to verifying that that was indeed the case. In practice, of course, regular troubles arose. But equally there were wholly routine, though local and contingent methods for handling these problems. Hence the manager's appended comments in the computer notes demonstrated above was one way of ensuring that both he and his staff had properly covered themselves.

And frequently there were general glosses that a manager might resort to in order to explain some of the more frequently observed errors. One such explanation that was particularly favoured in the new Lending Centre, where many of the staff had only recently come in from other places, amounted to there having been different ways of doing the same thing in different places and that the staff were still doing them the old way they had been used to 'where they came from'. And the feedback on such errors amounted to 'we understand this was the way you were used to doing it before but here we'd like you to do it like this'. There



are several important implications for this in relation to co-ordination throughout the centre and the negotiated fit between virtual and real teams.

Bittner, in a seminal paper regarding organisations that was first published in the 1960s, refers to the phenomenon of individuals working within an organisation orienting to what they understand to be 'the style' of that organisation (Bittner, 1965). With the checking procedures and the level of specificity they contain (they even specified the precise way in which names and addresses should be laid out) one can see an attempt being made within the bank to inculcate an exact uniformity of style. This obviously connects up with the ethos of standardisation we have already observed with regard to other activities within the Lending Centre and we can see lip service, or even 'gambits of compliance', being paid to this within the context of the frequently encountered chorus throughout the centre of 'we should all be doing it the same way'. When managers engage in overview, then, they are effectively monitoring the extent to which that edict of uniformity is being achieved. And, in so doing, they are effectively co-ordinating that policy within the teams and the units within the Centre, or at least the model of how those teams and units should behave. Yet, of course, mistakes continue to be made. And at that point managers become a locus through which the stylistic imperative of standardisation amongst the teams, and the actual stylistic output of those teams, gets negotiated. And this is itself a role that is far from clear cut and one that is open to negotiation between the managers as the following extract reveals where two managers discuss just what constitutes a 'fail' for a particular check:

Lending Manager (responsible for 'quality' overview of the centre's work) visiting Manager of 'Sanctioning' - Lending Manager (LM) hands over CRSA ('Controlled Risk Self Assessment') stuff

Sanctioning Manager (SM) pulls out CRSA Improvement and Action Summary and relevances part of it

LM details the process and what he considers to be 'best practice'

SM goes and gets a folder from his cabinet and relevances a set of sheets photocopied from a process manual - he passes these over to LM

LM quotes from them then sets out his understanding of what it is they say

SM pulls a face and takes the documents from LM

LM reformulates his understanding and expands on it - does this several times - each time of greater brevity - until he obtains some sort of response from SM who is reading

SM projects talking to someone else about it

LM checks whether SM agrees with his own line

SM sets out his own understanding of the process

Says to LM "I think that's all wrong that" and puts the folder back in the cabinet

#### Managing the Managing

Management is, of course, not an unreflective exercise. Local understandings of just what management amounts to and how it should be achieved abound. A Service Centre manager suggested that his role amounted to the following sort of outline:

Forty percent checking, forty percent management (consisting of the general operation of the unit, staffing and resourcing, administration, referral, work he generally characterised as extremely 'varied'), and twenty percent communication. He revised the figures to perhaps as much as sixty-forty, with the sixty relating to the checking and the forty to cover everything else. His main objectives he saw as being: keeping one step ahead of Region and Head Office; looking for ways to make things better from themselves; attending to Service Improvement; and attending to the needs of his staff, including those who chose to leave.

But managers are themselves managed. In the Lending Centre the managers we observed were themselves being managed by the Lending Centre Manager, whose own 'style' was epitomised in his "Can you produce it by Monday?" "Well,.." "No, I said can you produce it by Monday?" "Yes" that we commented on earlier.

And they were then responsible for managing the Team Leaders who managed the individual teams. Inevitably a good measure of how individual managers go about managing is intertwined with how they are being managed themselves. Here again, then, one encounters orientations towards the perceived 'style of the organisation', or at least how that style is being presented to them. And one also encounters 'gambits of compliance' where managers will manage those beneath them in order to achieve what they understand to be the organisation's aims, regardless of whether the methods they propose are ones that the bank's own procedures set out as being correct.

These sorts of phenomena were, in a sense, particularly visible in the new Lending Centre during the period of observation because the people who worked there were still trying to discover 'just what sort of beast this is'. One consequence of this was the preoccupation over the exact format appropriate for Management Information that we have already noted, provoking frequent discussion and debate.

Another consequence was that in the initial stages of arriving at REs for a particular task managers could be seen to indulge in what often amounted to substantial 'ad hocing'. In one instance a manager was heard to ask Team Leaders to just provide him with a 'ball park figure' so that he could set out some sort of standard figure, regardless of whether this could be currently achieved. He suggested that this figure could be refined in the actual process of using it. Such an observation is in no way intended to be critical of the manager concerned. It is rather a case of acknowledging that when presented with a particular work objective managers are no different to anyone else in their using whatever means are available in order to ensure that the objective is achieved. So it is exactly here that one encounters Bittner's notion of 'gambits of compliance' for it is in the doing of the work you are doing now that the sense of complying with some particular organisational objective is achieved. When we consider the way managers orient to and achieve compliance with what they perceive to be the organisational objective of standardisation, then, it is important point to note that standardised figures are frequently at best notional and are often acknowledged even by their users to be open to review. An extension of this point is the curious case of 'Spanish customs'.

There is much talk, strictly in negative tones, about the proliferation of 'Spanish customs' within the Bank. Now this doesn't mean that staff turn up to work periodically in sombreros or greet customers on the phone with the words 'Buenos días'. It is rather an acknowledgement, and a criticism, of the frequency with which people who work in the Bank will resort to the use of particularised local knowledge and local ways of doing things. However, it became manifest during conversations with the managers about how REs were arrived at, and in sitting in on a meeting between one of the managers and a Process Standards officer from another part of the bank, that such calculations were derived from timing the length it took staff to do the particular tasks in places where they were deemed to be engaged in 'best practices'. Whilst managers and Process Standards officials were always on the look out for Spanish Customs, they were also always on the look out for 'best practices'. And the Process Standards Officer was perfectly willing to entertain a review of particular standard REs should he be presented with an example of something that amounted to a 'best practice' that somehow surpassed those practices he had previously seen. Of course 'best practices' are as much local ways of doing things as Spanish Customs, prior to their circulation throughout the bank. As we saw when we looked at process modelling there is extensive local negotiation about the best ways of doing things, and in this activity numerous local understandings are brought into play. Yet the process maps such activities ultimately lead to are often then circulated around the bank as proposed standard models for the best way of going about doing something. Indeed we observed the efforts of two particular members over a number of weeks to get their process map for the handling of 'Out of Order Staff Accounts' accepted by Head Office as the standard model for handling that process throughout all the Lending Centres in the Bank. Whether something constitutes a Spanish Custom or a best practice is therefore something



hugely negotiable in local, situated interaction, according to whatever relevances the parties to such interaction might bring to bear. And, in view of the founding of standards upon best practice, we can see that the standards themselves are equally open to local negotiation and review.

Furthermore, as already noted above, for some tasks there are no current REs. Under such circumstances they do a rough calculation of how long it is taking people to complete the tasks in question and then apply that figure as an RE, hence the instance already cited where a manager requested a 'ball park figure'. However, if it subsequently transpires that the application of that figure is resulting in either large backlogs or staff who are effectively idle, then the figure can be, and is, revised.

What we have attempted to reveal, then, is that a great deal of the time the work of middle managers in the bank amounts to negotiating a fit between idealised, standardised, and 'virtualized' models of teams and the 'real' teams with whom they engage and interact from day to day. And the achieving of this 'fit' amounts to the pragmatic and wholly situated use of whatever means are available in order to meet what are perceived to be the organisation's objectives, and in accordance with what was seen to be the organisation's style. And this orientation towards making the models and the people work together in the context of routine work and routine troubles, such that they square up with perceived organisational ideals, whilst simultaneously keeping an eye on the backlogs and making sure the work is getting done, is as much a concern when it comes to managing the managing as it is anywhere else. However, the precise means of achieving that fit are always and necessarily situational. In that case it is important to emphasise that the phenomena we observed are not open to some sort of neat distillation into a formulaic representation of what it is that managers do (where the term 'manager' is taken to be generic).

#### So What is a 'Manager'?

When it comes to trying to arrive at some sort of understanding as to just what it is that 'a manager' might amount to the Oxford English Dictionary has this to offer:

Manager = 1588. 1. One who manages (something specified). Now rare in general sense. 2. One skilled in managing affairs, money, etc. 1670. 3. One who manages a business, an institution, etc. 1705. 4. One of several members of either house of parliament appointed for the performance of some duty in which both houses are concerned 1667. 5. Law. A person appointed, usually by a court of chancery, to manage a business for the benefit of creditors or others; usually receiver and manager 1793.

(OED, 1983, 1269)

Beyond such fruitless generality one can find in Management Science texts the following sort of broad definition:

"The process of management... subsumes five conceptually distinct, if, in practice, intertwined elements. To manage work in general means:

- 1 Deciding/planning what is to be done, and how.
- 2 Allocating time and effort to what is to be done.
- 3 Motivating, or generating, the effort to do it.
- 4 Co-ordinating and combining disparate efforts.
- 5 Controlling what is done to ensure that it conforms with what was intended."

(Hales, 1993, 2)

We would stress again at this point that the findings outlined in this paper are necessarily preliminary ones. A great deal of analysis remains to be done on what has come to be a substantial body of data. However, we would wish to underline the issues we have already pinpointed which we consider to be likely avenues for further, more systematic exploration. In that case it is important to stress that, as has probably become apparent by now, we find any



sort of generic gloss about what managers are and what they do problematic. Indeed, trying to gain some sort of empirical purchase upon this was one of the objectives underlying this study. We have, of course, suggested that they may have certain shared orientations. One of these we proposed was the trying to obtain some sort of fit between idealised models of teams and processes and the things that real people in real teams actually do, such that it could be accounted for in terms of "we should all be trying to do the same thing in exactly the same way", whilst simultaneously ensuring that people get through the work with 'tolerable backlogs' as it appears on their desks from day-to-day. But it is important that this is not read as some sort of indication that there are therefore generalisable things that all managers in financial services do. As we have been at pains to demonstrate in this paper, just what particular shared orientations may lead particular managers to do in particular circumstances is necessarily wholly contingent upon those particular circumstances. So it is never as simple as saying that because X and Y share the same orientation they will always and necessarily do Z because there is no accounting for the circumstance in which that orientation might arise.

Above and beyond all this, even a cursory glance at our fieldwork would reveal that the orientation we have described is not one that is uniformly shared by all managers in the Bank. For instance one of our study subjects was a relationship manager in a Business Centre. With the number of staff under him totalling 1 his concern with things like teamwork was minimal and the main focus of his work was, as his title implies, the management of relationships with customers. And even amongst the managers where such an orientation is displayed, it is only one orientation amongst many, a number of which will be explored as the analysis of our fieldwork continues.

We would strongly suggest, then, that what management amounts to is something that is a wholly situated concern with the particular practices being engaged in and the orientations displayed being very much tied up with the task at hand. None of this is to deny the institutional context in which they are operating. Managers can indubitably be seen to conduct meetings, advise, instruct and make decisions. However, they can also be seen to do a whole range of mundane things such as photocopying leaflets, punching holes in process maps, and humbly seeking advice about how to achieve certain things with computers from lower grade 'experts'. So there are complex ways in which incumbent categories such as 'the manager' and 'the managed' get drawn upon and made relevant in the interaction as it takes place. And in some cases, of course, such categories may well be effectively set aside.

It is therefore important to recognise that, although certain prosaic activities may be absent from generalised descriptions of management function, for the managers themselves such routine everyday tasks are as much a part of the work they do as anything else. Few, if any, of the managers in the bank now have what they impolitically call 'scrotes' to do such work for them. So is any theoretical depiction of 'a manager' sufficient if it fails to take into account the frequently routine and mundane things that managers do?

The fieldwork has also revealed that managerial roles are partly bound up with legacy issues. No-one simply walks in off the street to find they are a manager with a managerial function. All of the study subjects had progressed in the bank through, in many case, a large number of different jobs. The result of this is that for, say, a Lending Manager who has spent many years involved in various jobs to do with lending, he doesn't somehow overnight cease to become a lender and start to become solely a manager. And his depth of experience is not something private but rather something that is effectively publicly-owned. This means that on many occasions it is hard to know whether a manager is being asked a question by someone because he is the manager or because he is known to know about such things. So just what it is that an individual manager might do is just as much coloured by that individual's past - be it as a manager or anything else - as it is by any other consideration.

To further compound the issue, what anyone does at work on any one day is not something that can be conveniently summarised within one title. Someone who is a manager at one moment may become an employee as he opens up his payslip. The phone may ring and he may become a father or a husband. On another occasion he might be a friend. On yet another occasion he may well be a student. Being a manager is very much to do with what particular relevances an individual is currently oriented towards. But, as a day progresses,

other equally powerful relevances may be brought to bear. We are concerned to stress in that case that managerial work is something that is achieved in and through social interaction. Much of what they do in their ordinary everyday interaction is governed by the orderly methods of achieving sociality. What a manager is actually doing, and what it is that he achieves, when he goes up to talk to a member of staff for instance, has as much to do with his ordinary everyday competences as a conversationalist and the orderly way that a conversation goes as it has to do with the fact that he is a manager. So the ordinary everyday life that surrounds the working life of living, breathing, working people is as important when considering how that work is achieved as anything else (though, as we have already noted, the fact that the interaction takes place in an institutional setting necessarily impacts on the interaction in a number of complex ways). It is not enough, then, to just characterise the managerial role as something that is necessarily earnest, weighty and serious. In achieving effective social interaction it may be just as important to be jovial, flippant, ironic etc as it is to be earnest or anything else. And just what that manner of being might be is wholly down to what it is that you are doing, and with whom, here-and-now.

The PBO gives the CSB Manager a copy of a letter she has been preparing

The Manager reads it through

He gets to the bottom of the letter where it would be signed and realises she has replaced the word 'Manager' with 'Old Git'

He looks at the PBO with mock severity and points to the door motioning 'get out' then smiles and circles the words as though they were a spelling mistake

What we have therefore attempted to do in this study is to take the first tentative steps in what we feel to be a necessary direction. And we would strenuously argue the need for considerable further endeavour in subjecting the work of managers to close empirical investigation, not just as managers in relation to some abstracted notion of what constitutes managerial work, but as social beings who are achieving the work they do, not just in an institutional setting, but in an institutional setting that is inevitably a part of the social world.

#### Conclusion

We started out in this paper by suggesting that there are a number of ways in which the organisational changes that have occurred within the bank, and the sorts of working patterns that are apparently evolving within it, are moving it towards the idealised organisational form that has been characterised as 'the virtual organisation'. Idealised diagnoses of the impact of the technological change that such developments necessitate have proposed certain outcomes and these stood as a backdrop to the initial formulation of this project. However, whilst the bank is most certainly engaged in such technological changes the realities of how to manage that have proved to be less about wholesale revision of traditional working practices and more about how to accommodate the technology in such a way as to be able to continue to go about doing their 'business as usual'. Hence we have seen that technologically informed and derived models such as those embodied in the Management Information Packs and the Process Maps are not something unproblematic that have been simply applied as they have arisen. It is rather the case that managers have become involved in considerable work in order to negotiate ways of making such models 'fit' with the actual work that people do. And we have also seen that managers continue to monitor and interact with their staff in the same complex and socially contingent ways, spending much of the day walking to and fro and conducting a great deal of their communication face-to-face.

If we consider what impact such change has had on everyday teamworking we can see that, whilst there have been revisions in some of the rationales behind what they are doing, and the methods for accounting for what they do, teamworking continues to be largely centred around physical co-presence and local understandings, rather than flexible co-ordination across the organisational divide. This is not to say there have been no changes. The development of the large Lending Centre for the whole of the North West Region with its distribution of different aspects of the process across three floors could be seen to itself constitute something like a 'virtual team'. And there are efforts afoot, as we saw with the process modelling, to ensure that the Centre does operate in ways that are analogous to a



team. Indeed, the whole notion of splitting the Bank up into individual centralised, independent and widely distributed units, fronted by the Customer Service Branches, from the perspective of the achievement of a particular process from beginning to end with the division of labour that that entails, can itself be seen as something like the operation of a 'virtual team'. And, of course, the technological ramifications of these changes and the consequent need for advanced IT and means of achieving computer supported co-operative work are enormous. However, from the point of view of product loyalty and flexibility of function and the sheer seeing oneself from the egological perspective of the work that I do as the member of such a virtual team, a conventional depiction of the work members do in the bank as virtual teamwork is problematic. Members see themselves very much as parts of the team they are engaged with here-and-now, in the same proximal space, with a highly specialised function. And when one looks at how people might go about identifying with certain other people as members of the same team it is hard to overstress the importance of 'local ties'. In other words the social bonds that develop between people who spend all of their time in the physical company of one another, sharing the subtle interaction of informal talk and gesture, going to lunch with one another, meeting one another in the lift in the morning and departing with one another every night, are an integral part of the 'making of a team'.

This paper has proposed that there is something akin to 'the virtual team' in play within the Bank and important within its organisation. However this 'virtual team' has more to do with the sorts of models they have of the work people are doing together, shared between managers, housed within machines or depicted in their process maps, than it has to do with identifiable virtual interaction. And this sort of virtual team needs constant negotiation into the realities of the workplace, it is not something that can simply stand and work alone. And that negotiation, alongside the instantiation of strategic plans such as standardisation is something that is the day-to-day business of middle managers. And this is, of course, integrally bound up with the achieving of their work in social interaction which is itself something that has its own demands with regard to how you go about working with other people from day-to-day, with decisions always being actualised in a sociality that is here-and-now. It is this that is as much a concern for them as any sort of co-ordination across the organisational divide.

#### Acknowledgement

The research for this paper was drawn from the DTI-EPSRC funded initiative in CSCW; the ESRC 'Virtual Society?' program; and the NCR funded project 'Building the Virtual Bank'.

#### Bibliography

Anderson, R. J., (1994), 'Representations and Requirements: The Value of Ethnography in System Design.' Human-Computer Interaction, Vol. 9 pp. 151-182.

Anderson, R. J., Hughes, J.A., and Sharrock, W. W. (1989) Working for profit, ; The Social Organisation of Calculation in an Entrepreneurial Firm. Aldershot, Avebury.

Atkinson, J. (1986), Changing Work Patterns: How Companies Achieve Flexibility to Meet New Needs, London: National Economic Development Office.

Bittner, E. (1965), 'The concept of organisation', Social Research, 23, pp. 239-255.

Bowers, J. (1994), Understanding Organisation Performatively', COMIC Working Paper, MAN-1-4, Department of Computing, Lancaster University

Burton, D. (1994) Financial Services and the Consumer, Routledge, London

Button, G. and King, V., (1992) Hanging around is not the point, workshop paper, CSCW '92, Toronto.

Casey, C. (1995) Work, Self and Society After Industrialism. London. Routledge.

Davidow, W H and Malone, M S (1992) 'Work, Self and Society After Industrialism', London: Routledge



Ducatel, K 'Computer Networks in Britain: communication technologies or technologies of control?' in Robins, K (ed) Understanding Information: Business, Technology and Geography (London: Belhaven Press, 1992)

Garfinkel, Harold, (1967), Studies in Ethnomethodology, Polity Press, Cambridge

Geertz, Clifford (1973), 'Thick Description: towards an interpretative theory of culture' in 'The Interpretation of Cultures', New York: Basic Books

Gergen, J 'Organisation theory in the Postmodern Era' in Reed M and M Hughes (eds), Rethinking Organisation (London: Sage, 1992)

Grudin, J - 'The Computer Reaches Out: The Historical Continuity of Interface design', in Proceedings of ACM CHI '90 Conference of Human Factors in Computing Systems (New York: ACM Press, 1990)

Hales, Colin (1993) 'Managing Through Organisation: The management process, forms of organisation and the work of managers', London: Routledge

Hammer, M., and Champy, J. (1993) Re-engineering the Corporation: A Manifesto for Business Revolution. Nicholas Brierley Publishing.

Harper, R (1989) 'An Ethnography of Accountancy' Unpublished PhD Thesis, University of Manchester

Heritage, John (1984), 'Garfinkel and Ethnomethodology', Cambridge: Polity Press

Hughes, J. A., King, V., Rodden, T., and Andersen, H. (1994) "Moving out from the control room: Ethnography in system design". In Proceedings of CSCW '94, Chapel Hill, North Carolina.

Kunda, G. (1992) Engineering Culture: Control and Commitment in a High-Tech Corporation. Philadelphia. Temple University Press.

Lash, S. and Urry, J. (1987) The End of Organised Capitalism. Madison, Wisconsin. University of Wisconsin Press.

Lynch, M, (1990), 'The externalized retina: Selection and mathematization in the visual documentation of objects in the life sciences', from M Lynch and S Woolgar (eds), Representation in Scientific Practice, Cambridge Massachusetts: The MIT Press, 153-186

Nonaka, I. and Takeuchi, H. (1995) The knowledge-creating company : how Japanese companies create the dynamics of innovation. New York : Oxford U.P.

Onions, C T (ed) (1983), 'The Shorter Oxford English Dictionary', London: Guild Publishing

Pycock, J., Calvey, D., Sharrock, W., King, V., and Hughes, J., "Present in the plan: Process models and ethnography, Comic Document MAN-1-7

Randall, D., Hughes, J. A., and Shapiro, D. (1992) "Using Ethnography to Inform Systems Design". Journal of Intelligent Systems, Vol. 4, Nos 1-2.

Reed, M (1992)The Sociology of Organisations; Themes, Perspectives and Prospects Hemel Hempstead: Harvester Wheatsheaf,

Rheingold, H, (1992) Virtual Reality, London: Mandarin.

Sacks, Harvey (1992) 'Lectures on Conversation, Gail Jefferson (ed), Cambridge, Mass: Blackwell

Scott Morton, M. ed. (1991), The Corporation of the 1990s: Information Technology and Organizational Transformation, New York: Oxford University Press.

Suchman, L., (1987) Plans and Situated Action: The Problem of Human-Machine Communication. Cambridge University Press. Cambridge.

Webster, F. (1995) Theories of the Information Society. London. Routledge.

Zuboff, S. (1988) In the age of the smart machine. Oxford: Heinemann.