

# Decisions at the Boundary: Role Choice and Alliance Manager Behaviors\*

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## Abstract

Individuals in a firm tend to operate within a unifying set of organizational role expectations, but this is rarely the case in strategic alliances where different organizations' interests and expectations are involved. In this conceptual paper, we consider how alliance managers (AMs), the boundary spanners responsible for alliance success, navigate receiving firm-sent role expectations while also receiving legitimate partner-sent expectations. Role theory is incomplete regarding how AMs cope with this increasingly common, mixed-motive context and how the pull of the focal firm on AMs is affected. We address this theory gap by conceptualizing how the limiting nature of firm-sent expectations is affected by AMs' receipt of legitimate partner-sent roles, and is moderated by AMs' entrepreneurship and the structure of the inter-firm collaborative environment.

## Keywords

Alliance managers, role theory, role choice, alliance governance

## INTRODUCTION

Strategic alliances have risen in popularity over the last two decades (Gomes, Weber, Brown, & Tarba, 2011) as firms have sought to accelerate the pace of product development, market entry and innovation (Doz & Hamel, 1998). An alliance is a voluntary collaborative relationship (Dacin, Oliver, & Roy, 2007) in which two or more firms agree to exchange, share or co-develop resources to achieve mutual benefit (Gulati, 1995b). This relationship creates an environment where each firm's unique – though complementary – objectives must be recognized and accepted in order for the alliance to succeed. While such acceptance implies that the firm legitimizes the partner firm's objectives, the actual management of these objectives is complicated by the need to reconcile inevitable mixed motives (Chung & Beamish, 2010; Ness, 2009), further contributing to alliances' high failure rates (Cartwright & Cooper, 2011; Gulati, Wohlgezogen, & Zhelyazkov, 2012).

The difficulty anticipating the issues that ultimately emerge in alliances, despite careful selection processes (e.g., Cummings & Holmberg, 2012; Shah & Swaminathan, 2008) or the provisioning of policies and control mechanisms (e.g., Ariño, Ragozzino, & Reuer, 2008; Kuittinen, Kyläheiko, Sandström, & Jantunen, 2009; White, 2005), is one such cause of failure. Moreover, initial alignment conditions often change, requiring adjustments by the actors involved in an alliance over the course of its life cycle (Das & Teng, 2000; Majchrzak, Jarvenpaa, & Bagherzadeh, 2015). Because it is difficult to anticipate and forestall all the possible ramifications of changing conditions (Ariño et al., 2008), responsibility for alliance success rests with the participating actors who navigate and ultimately reconcile these expectations (Gomes et al., 2011; Xing & Liu, In press). It is these conditions that make an alliance a “socially complex organism, consisting of individuals or groups whose mindsets and interests are likely to shape their relationship” (Bell, den Ouden, & Ziggers, 2006, p. 1607).

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In this paper we consider the role challenges of perhaps the most pivotal of those actors shaping these relationships - alliance managers (AMs). Operating in what constitutes a boundary spanning role, AMs act as strategic sponsors (Spekman, Isabella, MacAvoy, & Forbes, 1996) that must adapt various alliance management processes as they seek to manage the various risks inherent in alliances (Das & Teng, 1999). In response to the aims of this special issue, we argue that a number of constraining factors not only create role conflicts in these collaborations, but also complicate the role decisions AMs make. These constraining factors include the role expectations of their own and their partner firms, as well as the influences created by AMs' levels of entrepreneurship and the alliance's governance structure.

The basis for this analysis is role theory (Kahn, Wolfe, Quinn, Snoek, & Rosenthal, 1964; Katz & Kahn, 1978), which holds that individuals adopt roles that are defined by the behavioral expectations that are "sent" by others in their firm. Since performing specified role behaviors secures the approval of role senders within their firm (whereas enacting different behaviors invites disenfranchisement), individuals ultimately enact their roles in conformance with firm-sent roles. Individuals working in a single organization can be subject to differing role expectations, but ultimately the unifying nature of the firm's structure produces a highly salient set of expectations that individuals can operate within (Katz & Kahn, 1978). Scholars have acknowledged that actors' agency can enable them to choose alternative actions (Fondas & Stewart, 1994; Noorderhaven, Peeters, & van den Elst, 2011), but this requires those individuals to deliberately act against firm-sent expectations. In essence, role theory suggests that the firm's role expectations create limits on employees' range of actions; to act otherwise requires some form of role rejection (Kahn et al., 1964).

In the context of alliances, however, these limits become less clear when there are multiple sets of potentially conflicting expectations (Chung & Beamish, 2010; Ness, 2009) that the firm has legitimized through the alliance agreement. Unlike non-alliance situations where the firm's sent expectations determine limits to behavior (Katz & Kahn, 1978), alliance situations introduce multiple and at times conflicting expectations. Because of this, AMs' actions are no longer a matter of simply accepting or rejecting roles, but rather a matter of choosing among the various expectations they are sent. Hence, AMs experience a unique form of role conflict that involves determining which role expectations to accept in any given situation.

Our analysis addresses three gaps in the extant literature. The first deals with the organizational orientation of role theory, which gives prominence to expectations sent by the firm over other sources (Katz & Kahn, 1978). Even though an employee can experience role conflict between work-defined and external expectations (e.g., union membership or customer affinity as explained in Kahn et al., 1964), role theory argues in favor of internal firm expectations. However, as organization-approved relationships, alliances also legitimize partner expectations, which can be at odds with a focal firm's expectations (Heide, 1994; Janowicz-Panjaitan & Noorderhaven, 2009). Consequently, AMs can be forced to adjust how they deal with the limits imposed on them by their firm's sent expectations given that they can also receive compelling expectations from their partner firm. Our analysis seeks to expand the implications of role theory in order to better explain the choice that AMs must make when the firm has endorsed alternative sets of role senders.

The second gap deals with governance assumptions. Because it is an organization level theory, role theory assumes individuals operate within the governance context of the firm. However, as a hybrid organizational form, alliances operate under a governance model that, while compatible with the focal firm's objectives, exists as a separate model. Moreover, alliance governance forms can range from one having highly formalized control to one based on relational elements (de Man,

2013). We suggest that these differing governance structures present AMs with an additional level of context in which to exercise choice than has been identified by traditional role theory.

A third gap considers AMs' degrees of freedom in operating in the alliance. As principal boundary spanners for the firm, AMs are responsible for communication and knowledge-sharing with the partner, roles which have been well defined in the boundary spanning literature (Khan, Lew, & Sinkovics, 2015; Leifer & Delbecq, 1978; Levina & Vaast, 2005; Tushman & Scanlan, 1981). However, an AM has also been described as "the person in the middle" (Spekman et al., 1996, p. 352) required to "work outside of prescribed routes and routines" (Spekman, Forbes, Isabella, & MacAvoy, 1998, p. 764). Hence, AMs' role tends to extend beyond traditional boundary spanning roles to that of managing the relationship, often in a manner that is at odds with organizational expectations. The responsibility to act in the best interest of the alliance, even when doing so might require them to operate outside the focal firm's processes, requires AMs to have a greater level of agency over their role choices. Consequently, it is necessary to consider how agency, as determined by AMs' level of entrepreneurship, expands on traditional role theory.

The remainder of this paper is divided into four sections. We first discuss the role of AMs. Then we employ role theory in order to examine how the salience of firm- and partner-sent roles affects the degree of flexibility that AMs exhibit. Next we consider how AMs' entrepreneurship and alliance governance form further moderate the salience of firm-sent roles. Finally, we discuss the contributions of this analysis as well as its research and managerial implications.

## **THE ROLE OF THE AM**

In alliances two or more independent firms exchange, share or co-develop resources to achieve mutual benefit (Gulati, 1995b). Firms strive to fit strategy and structure to their environment (Lawrence & Lorsch, 1967). Alliances facilitate this by enabling them to adapt to the demands of their industry and technological environments (Ring & Van de Ven, 1994), counteract market power (Howell, 1970), obtain synergies, specialization advantages or access to new capabilities, and quicken the pace of new product and market entries (Doz & Hamel, 1998). In order to achieve these benefits, firms in an alliance must acknowledge each other's objectives and be willing to accommodate them (Kale & Singh, 2009), thereby legitimizing partner objectives. While accommodation can create a number of adverse, unintended consequences (e.g., opportunism as described in Williamson, 1993), a more ubiquitous challenge occurs in attempting to address the inevitable mixed motives that stem from the complementary yet different objectives of the two partners (Chung & Beamish, 2010; Ness, 2009). Hence, alliances are highly dependent on the actions of participants to mitigate issues that arise (Bell et al., 2006).

Alliance managers (AMs) are individuals designated by their organizations to perform the various tasks required to steer alliances to a successful end (Gomes et al., 2011; Hoffmann, 2005; Hoffmann & Schlosser, 2001)<sup>1</sup>. As boundary-spanning relationship managers, AMs are called upon to exhibit a broad range of non-traditional skills in order to develop business with the partner (Goerzen, 2005) or control the alliance's project elements (Gerwin, 2004). Scholars have suggested that this role changes somewhat predictively over the life cycle of the alliance: prior to formalization of the alliance agreement AMs should act as the visionaries, strategic sponsors and advocates for the alliance while afterward they perform in an operational capacity (Spekman et al., 1998).

Although there are situations where AMs operate at both the pre- and post-formalization stages of the alliance life cycle, we delimit our focus to post-formation activities in order to provide a robust context in which AMs are subject to both firm- and other-sent roles, as well as to the

alliance's governance conditions. This post-formation context exposes AMs to temporal influences on performance (Doz & Hamel, 1998); commonly occurring alliance scope expansions that create the need to manage any resulting mismatches between initial designs and the subsequent opportunities presented (Reuer & Zollo, 2000); and unpredicted challenges that will subsequently arise during the implementation of the alliance (Ariño et al., 2008; Reuer, Zollo, & Singh, 2002) that require AMs to resolve various gaps (Douma, Bilderbeek, Idenburg, & Looise, 2000), mitigate a variety of risks (Cummings & Holmberg, 2012), and resolve emergent performance and relationship issues (Tjemkes & Furrer, 2010). Thus, regardless of whether AMs are involved in the pre-formation stage, which is more typically orchestrated by firms' senior executives along with their legal, financial and technical support functions (Mascarenhas & Koza, 2008; Sims, Harrison, & Gueth, 2001), they face the challenges of receiving multiple sent roles in the post-formation, operating stage of the alliance. Moreover, while an AM's firm's level of experience with alliances may allow for more complete governance negotiations as part of the pre-formation stage, AMs are nonetheless left to deal with any industry, partner personnel or other changes.

A second delimitation in this analysis is our focus on contractual versus equity-based alliances. Equity-based arrangements create a consolidated business structure that provides greater ability to control risks (Das & Teng, 1996; Oxley, 1999), whereas contractual agreements offer flexibility but, despite properly constructed contracts (e.g., Mayer & Argyres, 2004; Reuer & Ariño, 2007; Ryall & Sampson, 2006; Schepker, Oh, Martynov, & Poppo, 2014; Weber & Mayer, 2011), cannot fully anticipate unforeseen risks. We focus on contractual-based alliances because they rely upon the actions of AMs to a greater degree to address risks that arise (Bell et al., 2006; Das & Teng, 2000), suggesting that the variations in AM behaviors of interest in this analysis will be more prevalent.<sup>2</sup>

Though the extant literature has discussed many of the things AMs are expected to do to successfully guide their alliances post-formation, it has not explored the role conflict-induced stress (Fisher & Gitelson, 1983; Jackson & Schuler, 1985; Katz & Kahn, 1978) AMs can experience due to the range of roles they are expected to perform. However, given the importance ascribed to AMs in managing through alliance issues, failure to execute the proper role could become an impediment to performance. In the next section we investigate the middle ground that AMs inhabit between their own and the partner firms' expectations in order to better understand their choice-making processes.

## **ROLE THEORY**

Organizations have been defined as "a system of roles" (Katz & Kahn, 1978, p. 187) in which socially determined role expectations promote predictable patterns of behavior across the various units of the firm. In order to ensure the smooth functioning of the organization, conformity to these expectations is necessary since other individuals in the firm are dependent on prescribed roles being performed. Role theory (Kahn et al., 1964; Katz & Kahn, 1978) holds that individuals adopt roles that are defined by the behavioral expectations that are "sent" by others in the firm. Because individuals seek to avoid the stress caused by the role conflict they feel in rejecting sent roles (Tubre & Collins, 2000), they will be compelled to conform to those firm-sent roles. Hence, firm-sent expectations set limits on the range of behaviors individuals are likely to execute. While this theory has been applied to a variety of behavioral phenomena, such as teamwork (Aritzeta, Swailes, & Senior, 2007), opportunity selection (Mathias & Williams, In press) and, more pertinently, boundary spanner behavior (Liu, Gould, Rollins, & Gao, 2014; Marrone, Tesluk, &

Carson, 2007), it has not been applied directly to the behaviors of AMs operating in strategic alliances.

Despite the described role-limiting function of firm-sent expectations described above, individuals can nevertheless elect to act with a high level of human (de Rond & Thietart, 2007) or individual (Joyner, 2013) agency. This often occurs in instances where individuals perceive roles differently or choose to act independently and with flexibility toward firm-sent roles (Noorderhaven et al., 2011). It has been suggested that AMs are often required to do this because they are charged with working outside of normal organizational “routes and routines” (Spekman et al., 1998, p. 764). This implies that they must consciously reject the sent role expectations from their firm, risking loss of the rewards and satisfaction they would receive by conforming to role expectations. This can occur when AMs are required to select between supporting their own firm’s objectives and those of the alliance or partner (Dowling, Roering, Carlin, & Wisniewski, 1996).

Because firms create alliances, they likewise create the situations where AMs may have to choose between following firm-sent expectations and those of the partner. This creates a unique type of role conflict for AMs as well as a dilemma in terms which role expectations to choose to follow. In the next section we explore the nature of firm and partner sent roles.

### **The Salience of the Firm’s Sent Role Expectations**

Based on role theory, one would expect that AMs should conform to the behavioral expectations implied in the interests articulated by the leaders and other members of their own firm. Organizational structures and objectives re-enforce conformance to norms (Flores, Zheng, Rau, & Thomas, 2012), which in turn serves to formalize the role expectations sent from AMs’ firms’ members, limiting their willingness to act outside of those firm-sent roles. AMs’ behaviors will also be influenced by hierarchical elements. Even though roles are socially constructed, such that subordinates and supervisors may interpret roles differently (Rousseau, 1990), when role expectations are sent by supervisors they can be particularly compelling. Leaders’ positional ability to dole out rewards and/or sanctions will influence AMs to conform to defined expectations (Morrison, 1994). While scholars have suggested that supervisors’ power in and of itself is not sufficient to enforce adherence to expected role behaviors, it nevertheless creates dependency and provides a level of identity that makes it attractive for the subordinate to comply (Farmer & Aguinis, 2005). Since AMs are lower in status than their firms’ leaders who typically negotiate the alliance’s structure (Hoffmann, 2005), they are more likely to seek leader acknowledgement and approval, which they would receive by acting to carry out their own firm’s operational objectives in the alliance. Furthermore, the behaviors that leaders model denote implicit endorsement for commensurate behaviors (Santos, Hayward, & Ramos, 2012). Finally, due to the nature of their work, AMs can have long tenures with their firms, further strengthening their commitment to their firm’s norms. Indeed, a majority of AMs have been operating full time for between six and 20 years (Anonymous, 2009); this is the context that is the focus of this analysis.

Individuals who operate in accordance with their firm-sent role expectations experience greater satisfaction due to the reduced cognitive effort required to act congruently with those expectations (Solomon, Surprenant, Czepiel, & Gutman, 1985). Since firms have established procedures, objectives and cultures that often conflict with those of the alliance partner (Das & Kumar, 2010b; de Man & Luvison, 2014), leaders and other firm members from the AMs’ firms will be inclined to advocate that AMs utilize those in the alliance. Because individuals seek to avoid the stress associated with role conflict, AMs would likely choose to act in a manner that meets the normative expectations of fellow firm members (Kahn et al., 1964). This would mean that they would likely

stay away from behaviors that connote flexibility toward accommodation of partner needs, such as working outside of the contract (Spekman, Isabella, & MacAvoy, 2000), making unconditional concessions to the partner (Hansen & Nohria, 2004), and adopting more flexible decision-making processes (Watenpaugh, Lynch, de Man, & Luvison, 2013). Consequently, AMs would instead act in a manner that was congruent with their firm's processes, culture and norms. As predicted by role theory, the more salient the firms' sent roles the more likely AMs are to be constrained to act in accordance with their firms' procedures and thereby the less likely they are to try to accommodate the partner.

*Proposition 1a:* As their firms' sent role expectations become increasingly salient, AMs will be less likely to choose flexible alliance management processes that accommodate the partner.

### **The Salience of the Partner's Sent Role Expectations**

In addition to receiving roles sent by members of individuals' own firms, individuals can also receive roles sent from outside organizations (Kahn et al., 1964). Those involved in boundary-spanning roles must therefore navigate between different role senders' expectations. However, while traditional conceptualizations of this phenomenon have identified interorganizational situations (for example trade union membership or sales persons' interaction with customers described in Kahn, et al., 1964), there is a gap in the literature regarding the alliance context considered here. We argue that alliances represent an important environment where the very boundary-spanning behaviors required of AMs can lead to their perceiving of their firm-sent roles as less salient.

Specifically, alliances represent a collaborative relationship where the focal and partner firms' interests are tightly intertwined in order to achieve alliance success, making the partners' interests potentially as important as those of the focal firms. Since their partner counterparts in the alliance also send role expectations to AMs, AMs occupy a middle ground between their firm and their partner. As the principal boundary spanners in an alliance, AMs are subject to the role choice conflicts such an intermediary position can create (Liu et al., 2014). Due to the heightened need to work with their partners, AMs have a high level of communication and very often numerous face-to-face meetings with the partner. As such, they are more likely to operate outside the firm's physical confines than other stakeholders. The greater physical distance from their own firms helps support their sense of psychological distance from the influence of their firms and the related role expectations (Katz & Kahn, 1978).

Because they interact with their partner counterparts on a frequent basis, AMs often also develop a level of trust with their counterparts that promotes psychological safety and a greater willingness to cooperate with the partner (Janowicz-Panjaitan & Noorderhaven, 2009). Indeed, trust building is one of AMs' most important functions in the alliance (Das & Teng, 2001). While interorganizational trust has traditionally been conceptualized at a firm level (Gulati, 1995a; Luo, 2002; Parkhe, 1998), more recent studies suggest that it is a multilevel phenomenon (Fulmer & Gelfand, 2012) that initiates with boundary spanners (i.e., AMs) and ultimately becomes a firm-level behavior (Schilke & Cook, 2013). The high level of trust created between AMs and their partner counterparts strengthens their level of appreciation for the partners' interests, making AMs more likely to advocate for the partner. Since advocates are less likely to be inhibited by personal risks (Geletkanycz, 1997; Howell & Higgins, 1990), this weakens the psychological pull of the

AMs toward their own firms' objectives, causing AMs to be more comfortable operating outside of the sent role expectations from their own firm.

While there is still the impetus to conform to the role expectations from members of their own firms - and incumbent stress for not doing so - this impetus can be counteracted by the desire to satisfy the role expectations of the trusted partner. Trusting relationships are predicated on a sense of vulnerability toward another individual (Mayer, Davis, & Schoorman, 1995). In the case of AMs, the working relationship with their partner counterparts engenders a strong bond (Janowicz-Panjaitan & Noorderhaven, 2009). When such bonds exist role expectations sent by the partner will have a high level of salience. While acting in favor of the partner's rather than the firm's expectation clearly introduces one type of role conflict, it can be offset by the satisfaction AMs receive by satisfying the partner's expectations. When this occurs, the limiting effect of firm-sent roles is likely to be reduced; AMs will feel less constrained to act in accordance with their firm's procedures and more inclined to try to accommodate the partner.

*Proposition 1b:* As their partner's sent role expectations become increasingly salient, AMs will be more likely to choose flexible alliance management processes that accommodate the partner.

As has been noted above, AMs are subject to a high level of role conflict as they reconcile both their own and their partner firm's objectives (Spekman & Johnston, 1986) in choosing how to manage the relationship. We have argued thus far that they do so in part based on the salience of firm-and partner-sent expectations. However, there are additional elements that influence AMs' role choice. In the following section we discuss two moderating elements, an AM's level of entrepreneurship and the alliances' pre-determined governance structure, in order to ascertain how AMs will choose to behave.

## **MODERATING INFLUENCES ON ALLIANCE MANAGERS' ROLE CHOICE**

### **Entrepreneurism**

In addition to role expectations sent from their firms and partner counterparts, AMs also have their own expectations and interpretations of a role (Kahn et al., 1964; Katz & Kahn, 1978). As individuals take on different roles (Reichers, 1985) they act in a manner that fulfills the expectations of that role in order to reduce their level of role conflict (Mathias & Williams, In press), even when it requires them to think or act differently from their other roles (Ren & Guo, 2011). Hence, individuals are capable of being comfortable in different roles. Moreover, because their perception of proper role behavior is socially constructed, there are not always common interpretations of what a role demands; what one person considers to be conforming behavior another might construe to be non-conforming behavior (Morrison, 1994).

Roles have typically been expressed in terms of the job requirements associated with a position. However, individuals can also independently determine "self-sent" roles (Kahn et al., 1964) that are determined on the basis of personal values and attitudes (Mathieu, Tannenbaum, Kukenberger, Donsbach, & Alliger, 2015). Others may still send role expectations but now the individual decides whether to internalize them or not (Markus, 1977; Stryker, 2007; Stryker & Serpe, 1994). Individuals may even have a hand in determining their own role expectations (Fondas & Stewart, 1994; Kahn et al., 1964).

Many personality characteristics can have an influence on how a role is accepted (see Kahn, et al., 1964 for examples of how role conflict has been studied in terms of various characteristics). We suggest that AMs' level of entrepreneurship is also likely to influence their decision on which mode to gravitate to. AMs' characteristics have long been described in entrepreneurial terms, such as creative (Spekman et al., 1998), reliant on informal networks and ties (Spekman et al., 1996), adaptable (Taylor, 2005) and risk taking (Kotter, 1996). Given the fact that when in the process of launching an alliance AMs essentially perform many of the functions an entrepreneur performs when launching a business, such as espousing a strategic vision, shaping mutual expectations, building coordinated business processes, organizing a diverse set of workers, and fine-tuning operations as needed (Hoffmann, 2005; Spekman et al., 1998), our focus on AMs' entrepreneurship seems particularly appropriate.

Scholars have suggested that entrepreneurship influences whether AMs will conform to a sent role (Noorderhaven et al., 2011), noting that entrepreneurial AMs are more likely to exhibit flexibility toward the partner than their leaders (Janowicz-Panjaitan & Noorderhaven, 2009) as manifest in the use of creative approaches to manage their partnerships (Khalid & Larimo, 2012; Luvison, de Man, & Pearson, 2011). An entrepreneurial orientation can lead to a variety of behaviors and outcomes dependent on context (Mathias & Williams, In press; Saeed, Yousafzai, & Engelen, 2014) and culture (Liu, In press). Individuals having entrepreneurial characteristics such as a high power motivation, low risk aversion and internal locus of control are thought less likely to accept sent role expectations (Fondas & Stewart, 1994) than those with low power motivation, high risk aversion and an external locus of control. Since entrepreneurial oriented individuals are found to operate more creatively and proactively (Miller, 2011) and with less concern for personal risk (Howell & Higgins, 1990) or uncertainty (Liu & Almor, 2016), they are less prone to role stress.

For these reasons we would expect AMs to be better able to disregard the limitations imposed by firm-sent role expectations, and to be more influenced by partner-sent role expectations as they seek to accommodate the partners' needs. AMs with a high level of entrepreneurship would thus be more willing to accommodate partner needs by choosing flexible alliance management processes, whereas those with low levels of entrepreneurship would be less willing to accommodate partner needs as they seek instead to remain more in alignment with firm-sent expectations.

*Proposition 2:* AM's level of entrepreneurship will positively moderate their choice of flexible alliance management processes that accommodate the partner.

## **Governance Structure**

AMs operate in inter-firm collaborative environments governed by the alliance arrangements. Such alliance arrangements must be structured in a manner that aligns respective interests and facilitates the ongoing management of the relationship (Crook, Combs, Ketchen, & Aguinis, 2013). Even though firms exert substantial effort assessing potential partners in order to create this alignment (e.g., Cummings & Holmberg, 2012; Duisters, Duysters, & de Man, 2011; Shah & Swaminathan, 2008), they still find the need to establish governance structures for the alliance once they have settled on the most fitting partner. An alliance's governance model, the structure under which the alliance is managed (Albers, 2010; Hoetker & Mellewigt, 2009), is designed to enable each firm to obtain its anticipated common benefits (Zhang, Shu, Jiang, & Malter, 2010). Elements typically include policies, procedures and administrative controls to prevent their firms from being exploited by their partners (Malhotra & Lumineau, 2011) and to coordinate activities,



allocate resources and implement tasks as efficiently and effectively as possible (Anderson & Gatignon, 1986; Geringer & Hebert, 1989; Killing, 1982). Governance structure is often defined at the time of alliance formalization; it determines the way in which the alliance will be managed during its post-formation phase.

Alliance governance forms operate by using a continuum of mechanisms ranging from those based on formalized control to those relying on relational trust (Das & Teng, 1998; de Man, 2013; Inkpen & Currall, 2004). Formal governance structures, as exemplified by detailed contracts and strict rules between partners, are intended to counteract partners' tendencies toward self-interested and opportunistic behaviors, whereas relational governance structures, as exemplified by trust and the partners' mutual commitment to a common vision, are intended to counteract opportunism by facilitating information sharing and adaptation (de Man & Roijakkers, 2009). While others have examined how governance structures promote alliance success (see Costa & Bijlsma-Frankema, 2004, 2007; de Man, 2013; Puranam & Vanneste, 2009; Vlaar, Van den Bosch, & Volberda, 2007 for discussions regarding choice of governance model), we focus on how the respective alliance governance forms affect AMs' firm-sent role enactments.

**Formal Alliance Governance.** Formal alliance governance is comprised of three elements that direct an intended set of behaviors: standards specification, monitoring mechanisms, and sanction/reward mechanisms (Edwards, 1979, as cited in Weibel, 2007). By providing clear expectations for actors in an alliance, as well as the consequences for improper actions, formal governance structures provide controls to deter one partner from taking advantage of the other (Lee & Cavusgil, 2006; Oxley & Sampson, 2004; Reuer & Ariño, 2007). However, formal governance structures also offer prescriptive guidelines for how conflicts and future situations should be handled (Lusch & Brown, 1996). Firms' managers, with the involvement of financial and legal functionaries (Argyres & Mayer, 2007; Mascarenhas & Koza, 2008), typically negotiate formal governance structures that accompany contractual alliance agreements. In such situations, AMs are typically subject to the conditions of the formal alliance agreement.

Because they create a discrete set of behavioral conditions as well as legal consequences for failing to act accordingly, formal governance structures create additional incentives for AMs to follow prescribed routines. Governance structures are negotiated by AMs' firms, and failure to act in a manner congruent with the dictates of the governance structure will therefore result in increased stress in the AMs' relationship with both their own firms' leaders and fellow workers (Dahlstrom & Nygaard, 2016). Since individuals seek to minimize the stress that occurs through role conflict (Kahn et al., 1964), we suggest that formal governance structures will enhance the constraining effects of firm-sent expectations and inhibit AMs' willingness to act flexibly in the alliance.

*Proposition 3a:* A formal alliance governance structure will negatively moderate AMs' choice of flexible alliance management processes that accommodate the partner.

**Relational Alliance Governance.** Unlike formal alliance governance models, which stipulate standards and penalties for improper actions, relational alliance governance operates through trust-based relationships arising from social exchange (Lee & Cavusgil, 2006). Because these exchange relationships permit parties to assess others' motives, each party is subsequently able to make inferences about the other's future actions and overall trustworthiness (Anderson & Weitz, 1989; Kramer, 1999; Lindsfold, 1978), thereby reducing the riskiness of interactions with those individuals (Mayer et al., 1995). Mutual trust suggests that each party will behave as expected

(Ring & Van De Ven, 1992), creating an informal safeguard to opportunism (Das & Teng, 1998; Zaheer, McEvily, & Perrone, 1998). Relational governance also encourages resource exchange and reciprocity (Lavie, Haunschild, & Khanna, 2012; Madhok, 1995), which provides an element of predictability in relationships as well as facilitating conflict resolution (Ring & Van de Ven, 1994). Germane to the contractual alliances considered in this analysis, relational governance has been found to be beneficial to managing contractual relationships lacking formal safeguards (Gulati & Singh, 1998), enabling simpler agreements (Gulati, 1995a; Larson, 1992).

Relational governance structures are emergent, rather than pre-structured during alliance formation. Consequently, boundary spanners, and particularly AMs, play an important role in trust development because they create the social exchanges that subsequently transfer to the firm level (Sarkar, Aulakh, & Madhok, 2009; Zaheer et al., 1998). Because of their emergent nature, relational governance forms provide AMs with greater ability to influence how the alliance will be run than do formal governance forms.

This ability to influence the nature of relational governance conditions affords AMs with fewer constraints to working outside their firm's role expectations. We propose that the nature of stress normally created through firm-sent role expectations in relational governance contexts likewise affects AMs' role enactment, though in an inverse manner. AMs who would normally be prone to act in an inflexible manner due to expectations from their leaders and fellow firm members will now also be influenced by the need to create mutually satisfactory interactions with the partner. The stresses of deviating from firm-sent roles will now be offset by the stresses created by not working to accommodate the partner's sent role expectations, thereby decreasing the limiting effect of firm-sent expectations. As a result, we would anticipate that this offsetting effect would negatively moderate AMs' inflexibility, causing them to become more flexible in order to build stronger cooperation.

*Proposition 3b:* A relational alliance governance structure will positively moderate AMs' choice of flexible alliance management processes that accommodate the partner.

### **Interaction Effects between Entrepreneurism and Governance Structure**

Scholars have attributed a number of characteristics to entrepreneurs, such as risk-taking and aggressiveness (Covin & Slevin, 1991; Dickson & Weaver, 1997; Fondas & Stewart, 1994; Howell & Higgins, 1990), preference for decentralization and long-term perspectives (Zahra, Hayton, & Salvato, 2004), and high power motivation (Fondas & Stewart, 1994). In and of themselves, these characteristics might suggest that highly-entrepreneurial AMs would tend to operate independently of the constraints imposed by the alliances' governance structure. However, entrepreneurial managers have been found to be constrained by firms' structural elements, causing them restrict their action in order to act in ways that closely aligned with that structure (Ren & Guo, 2011). Similarly, entrepreneurial firms tend to be more likely to resort to highly complex and formalized contracts when their alliance is believed to have a high level of strategic importance. This suggests that, despite entrepreneurial AMs' reputation for agility and low risk aversion, they will nevertheless give greater weight to mechanisms contained in a formal governance structure. If only to reduce the stress that accompanies the risk of sanctions (Mathias & Williams, In press), we propose that entrepreneurial AMs will be more likely to be constrained by such a structure and that they will limit their behaviors accordingly.

On the other hand, we propose that relational governance structures reduce the constraints AMs perceive in managing their alliances. Some of the key behaviors of entrepreneurial AMs relate to

their ability to promote a common vision among participants (Khalid & Larimo, 2012), encourage goal-driven rather than process-guided thinking (Marion, Dunlap, & Friar, 2012), and focus on long-term outcomes (Zahra et al., 2004). Because relational governance structures emerge from the trust-developing interactions of alliance participants (Anderson & Weitz, 1989; Kramer, 1999; Lindsfold, 1978), AMs have greater comfort and flexibility to exercise those behaviors. In such an environment, entrepreneurial AMs will encounter fewer role stressors that place limits on their actions and be less constrained in their behaviors. This, in turn, allows them to act more flexibly.

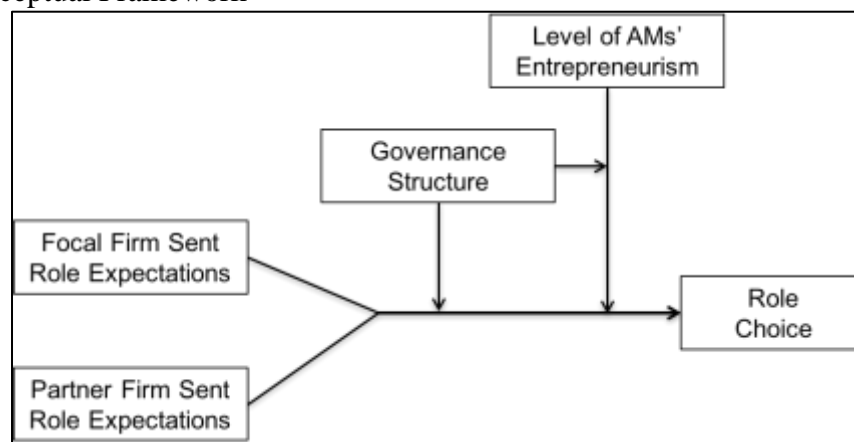
*Proposition 4a:* A formal governance structure will negatively moderate the effect of AM's entrepreneurship, causing them to choose less flexible alliance management processes that accommodate the partner.

*Proposition 4b:* A relational governance structure will positively moderate the effect of AMs' entrepreneurship, causing them to choose more flexible alliance management processes that accommodate the partner.

## DISCUSSION

The purpose of our inquiry in this special journal issue was to consider how AMs navigate the various role expectations occurring in the collaborative alliance relationships they manage. Figure 1 captures the relationships we explore between role expectations and role choice, as well as the hypothesized moderating effects. We have argued that role theory's ability to explain employee behaviors is incomplete when viewed in terms of an alliance context for three reasons. First, firms' formal acknowledgement of their partners' objectives through an alliance agreement creates a second set of legitimate objectives to be managed. Consequently, the limiting power of firm-sent role expectations can be compromised by the need to also accommodate partner-sent expectations. Second, alliances are a hybrid organizational form (Williamson, 1985) that is managed through a separate governance structure. As a result, firms' individual governance models are affected by the alliance governance structure, reducing the singular salience of a firm's governance expectations. Finally, the inability to completely anticipate alliances' ultimate requirements at the time they are formed means that AMs must make continual adjustments while managing the relationship. Many of these adjustments involve working outside established procedures (Spekman et al., 1998), calling on AMs to act independently of their firms' expectations. In such cases, role theory's limiting effects will be offset by the need for AMs' agency.

**Figure 1.** Conceptual Framework



This analysis offers two contributions to our understanding of role theory and specifically AMs' behaviors in collaborative situations. The first is that collaborative settings such as alliances create situations where the principal actors are required to make role choice decisions. Contrary to the prescripts of role theory as described above, in order to successfully manage alliances AMs must satisfy the expectations of multiple sent roles, even though the processes, cultures and objectives of the senders are often not identical (Kumar & Patriotta, 2011). In order to effectively interact in such an environment firms must develop an interpretative framework of sensemaking (Das & Kumar, 2010a; de Man & Luvison, 2014) that facilitates their ability to adapt. Since AMs are the boundary spanners facilitating this sensemaking, they must give greater or at least some import to partner expectations in order to successfully navigate the alliance.

Consequently, AMs' role conflict is of a multi-organizational nature, stemming from their need to balance role expectations from multiple firms. The nature of AMs' role conflict thus stems not from a role acceptance decision but rather from the stress caused by determining which source of sent roles is most salient. In other words, AMs must choose how to act in accordance with *both* their focal firms' and their partners' expectations. Of course, it is quite possible that all of these expectations will be in alignment, thereby saving an AM from having to choose, but given the high failure rate documented for alliances due to issues associated with both poor cooperation and ineffective coordination processes (Gulati et al., 2012), this is likely to be the exception. In situations where expectations are not aligned, fulfilling firms' sent role expectations becomes secondary to the need for role choice (Stryker, 2007). Our analysis extends role theory by identifying conditions for how such choice is made in collaborations.

A second contribution deals with two other factors that moderate AMs' role choice. It has traditionally been held that the alliance governance structure sets the conditions under which the alliance will be managed (Albers, 2010; Hoetker & Mellewigt, 2009), thereby enforcing desired behaviors among the alliance participants. While we do not dispute the enforcing function of governance, we suggest that its effect on the behavior of AMs will be more variegated, specifically in the manner by which it will influence AMs' role choice. We would suggest that formal governance structures create additional role stressors for AMs, due to their heightened desire to avoid sanctions and penalties from their firms, and that these stressors moderate AMs' choices to be more in line with the sent expectations of their firms. On the other hand, we argue that relational governance structures are less prescriptive in terms of specifying constraining behaviors and hence less stress inducing. Since AMs have greater latitude to define the nature of alliances when operating within a relational governance structure, they will be less limited to act only in accordance with firm-sent expectations, and therefore will be more likely to seek to accommodate the partner through use of flexible alliance processes.

A similar moderating effect occurs in terms of AM's level of entrepreneurship. AMs' requirement to work outside the firm's role expectations (Spekman et al., 1998) creates a form of role conflict that differs from that encountered by traditional boundary spanners oriented to communication and knowledge transfer (Khan et al., 2015; Leifer & Delbecq, 1978; Levina & Vaast, 2005; Tushman & Scanlan, 1981). Because of the requirement to be more creative, AMs' role choice will be more strongly influenced by their level of entrepreneurship. Those AMs with higher levels of entrepreneurship will find themselves more comfortable in this role, therefore being less limited by firm-sent expectations, whereas those with lower levels of entrepreneurship should be more constrained by those expectations.

We suggest that the collaborative nature of alliances, in which both partners must acknowledge the other's objectives and requirements, gives special significance to governance structure and AMs' entrepreneurship beyond what has been suggested in the role theory literature. For instance, while an employee who is also a union member is sent expectations by both the firm and the trade union, and such a situation creates role conflict (Kahn et al., 1964), both sets of expectations are clear and generally non-conflicting within themselves. This leads to reduced stress and a straightforward role choice *within* each role. However, in alliances the governance structure and AMs' level of entrepreneurship are expected to dovetail in a way that facilitates the execution of the alliance *across* both roles. The discrete effects of each are not as easily segregated, as each affects the ultimate success of the alliance (as has been argued above). Our analysis helps clarify how these two moderators expand on the nature of role choice in alliances.

### **Implications for Research**

One implication of our analysis is it highlights a need to better understand the mechanisms by which AMs evaluate and ultimately weigh the various role expectations they encounter. While we examined several factors affecting the role acceptance decision, we have not taken the next step to posit the processes by which AMs trade off these various role influences. There are likely a number of situational conditions (Ashforth, Harrison, & Corley, 2008; Liu, In press) that, when combined, would provide more prescriptive guidance on AMs' role choice processes.

In addition to conducting an empirical study to examine these conditions<sup>3</sup>, a second research opportunity deals with the influence of experience on role choice. Various studies have found that firms become more proficient at alliances as they do more of them (Al-Laham, Amburgey, & Bates, 2008; e.g., Anand & Khanna, 2000; Rothaermel & Deeds, 2006), though diminishing returns occur after firms have participated in six alliances (Draulans, de Man, & Volberda, 2003). In terms of our analysis, this suggests that as firms participate in more alliances their role expectations evolve and are more likely to become reconciled to the more adaptive requirements needed for alliance success. Hence, this evolution would result in more "realistic" expectations being sent to alliance managers, thereby reducing the propensity for stress related to role conflicts. Future studies could better identify whether and at what point experience moderates this stress as well as the effects proposed in this paper.

Related to firm experience is the effect that AMs' additional experience would have on the nature of their role choices. We have suggested that AMs' choices are made relative to the limits of sent role expectations. However, such choices could be manifest in different ways based on AMs' level of experience. For example, more senior and/or tenured AMs could attempt to reset their firms' expectations or to renegotiate the alliance's governance structure. Because the alliance management function has been shown to enhance firms' alliance capabilities (Kale & Singh, 2007), AMs could take a more developmental approach by working to change their firms' capabilities or even culture toward alliances. Further research could help uncover how differing AMs' responsibilities, such as inclusion in the selection or negotiation process or even involvement in the development of the firm's alliance strategy (Steinhilber, 2008), could affect the nature of focal firm members' role expectations.<sup>4</sup>

In this paper we have adopted a focal firm perspective, but an additional area of interest involves understanding how levels of congruence between paired AMs' role decisions can determine each other's behaviors (Olk & Elvira, 2001). While we have posited how a *focal* firm's AM would operate relative to various sent roles, we have not considered the role behavior of the *partner firm's* AM as each AM attempts to reconcile his or her own behavior with that of the

partner. We have also not considered the potential dilution of sent roles that might accompany situations where AMs are involved in multi-firm alliances, or are responsible for more than one alliance. Thus, a deeper investigation into how the AMs' combined role enactments affect their behaviors could prove instructive.

Finally, while the context of our analysis is alliances, the same firm-sent limitations placed on AMs can be argued as well to be placed on other boundary spanners in other settings. By framing role theory as incomplete regarding how AMs cope in mixed-motive contexts, we introduce potential extensions of role theory on how boundary spanners in general are affected by receipt of legitimate intrafirm-sent expectations (e.g., in research and development projects) and other interfirm-sent expectations (e.g., in joint ventures and acquisitions). While each context has unique nuances, prior research has successfully examined concepts such as knowledge transfer across organizational governance modes, both from a theoretical (c.f., Choi & Lee, 1997; Dixon, 2000; Kostova, 1999) and an empirical (Cummings & Teng, 2003) basis. Consequently, we suggest that a similar cross-organizational governance mode extension of role theory holds significant promise.

### **Implications for Practice**

We would suggest that our analysis opens the discussion for how AMs' characteristics need to be matched to the context of the alliance, and leaders need to be more attuned to the types of individuals who are put in AM roles and how they are managed. For example, in alliance situations where the focal firm has greater power than the partner in the relationship, it may behoove the focal firm to employ an AM who is less susceptible to partner needs or who is less entrepreneurial in order to reinforce its comparative power. Similarly, in situations with a less formal and/or relational governance structure, it may be preferable to employ an AM who is more responsive to the partner or who is more entrepreneurial. If an AM's role is not properly related to the needs of the alliance, then there is a higher likelihood for mismanagement.

We would likewise offer that a key function of AMs is to manage the roles of both their firms' and partners' sent expectations. Contrary to the role episode model described in role theory (Katz & Kahn, 1978), in the alliance context AMs' need to satisfy the alliance partners' expectations as well as those of their firms places them in the awkward position of having to do just that. When the reasons for refusing to comply with focal firms' sent roles are due to legitimate but conflicting requirements of the partner, there can be greater need for members of the focal firm to modify their expectations. AMs' ability to reset focal firm expectations thus becomes an important skill and obligation, albeit a difficult one given their lower position in their organization (Hoffmann, 2005). Consequently, leaders at the focal firm should not only be more aware of this process, but also be prepared to support AMs' need to modify the expectations of other members in the focal firm when appropriate.

### **FOOTNOTES**

1. Although alliance managers can exist in a variety of forms (e.g., full- or part-time, de facto, etc.), this analysis is focused on full-time AMs. Alliance management has emerged as a profession, as represented by its own association (The Association of Strategic Alliance Professionals) and certification process. Moreover, an increasing number of firms have established a separate alliance function (Kale & Singh, 2009), further leading to the emergence of alliance management as a formal organizational role. Full-time AMs are the focus of this analysis because their competency and cumulative experience gives them greater ability to exhibit role choice.

2. Implied in our focus on contractual alliances is the assumption of dyadic alliances. While our core arguments can apply as well to multi-firm alliances, there are several complications related to dilution and complexity that make such contexts outside the scope of this analysis. Additionally, contractual alliances are a structural concept defined in the alliance literature. As a result, they differ from the concept of a psychological contract (Rousseau, 2011). While we acknowledge that psychological contracts can have an impact on how AMs interpret role expectations, we consider that to be beyond the scope of this analysis.
3. A recommended methodology is available from the lead author upon request.
4. Governance structure has been our focus in this paper due to its direct influence on how an alliance is managed. Nevertheless, there are additional factors that are also likely to moderate AMs' behaviors in alliances, such as their firms' culture or level of alliance capability. These elements have been shown to have an influence on alliance performance and consequently will influence AMs' role choice. While we have not chosen to consider all such elements in this paper, they are also likely areas to include for additional future research into the area of AMs' role behaviors.

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