

CRITICAL INTERVIEW TECHNIQUE AND VISUAL AIDS - REVEALING THE BEGINNING OF A PROCESS

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ABSTRACT

Purpose and literature addressed: *The purpose of this paper is to present methodological tools to trace the beginning of a process in interfirm relationships. The paper relies on the interaction approach, which sees markets as continuous and changing interaction and exchange processes between firms (Håkansson, 1982; Ford, 1980).*

Method: *Impulses that set off change processes are discovered with the help of retrospective processual case studies and critical interview technique with visual aids (Chell, 2004). Case studies in business travel management exemplify the use of these techniques. In critical interview technique, the informants describe specific events that lead to major changes in the core relationships. Visual aids, i.e. drawings with a time axe, where the informants marked the event, and a vertical axe, where they marked its consequences in terms of closeness and distance in the relationship, were used in order to focus the interview, and to get a sense of the nature and chronology of the changes. The intertwined events were organized into four change impulses that were noticed to initiate extensive changes in the core relationships.*

Major findings: The informants described mainly the same events, but from different perspectives. However, even though the core actors were actual co-operating partners, the change processes discovered were quite generic, describing rather industry specific than relationship specific change processes.

Contribution: The paper contributes business network research with methodological tools to study how a change process begins. Time perspective is included in the study, and it makes distinction between the individuals and firms by providing the individuals' perspective to organizational processes.

Keywords: Processual case study, change process, changes impulse, critical interview technique, visual aid.

INTRODUCTION

In the IMP approach, the process view of interaction and exchange is important (Halinen and Törnroos, 1995). Business relationships in networks are seen as dynamic and changing, where the process of business consists of interactions “*within business relationships between individually recognized interdependent actors, and which have particular outcomes for each of those involved*” (Ford and Håkansson, 2006). The process nature of business relationships is emphasized specifically in the service context, where buying and consuming services are integrated processes that cannot be separated. (Grönroos, 2006) However, relationship marketing and management research is mainly dedicated to how relationships are maintained and developed (e.g., Grönroos, 1995; Håkansson, 1982; Ford et al., 1998).

Processes can be understood as a series of actions that are carried out with a specific result in mind. However, in organizational studies, the term process is usually connected to change, and it may also be investigated as unintentional developments that result in change. Tools to gain understanding on the process characteristics of interaction and networks are still missing (Halinen and Törnroos, 2005). *The purpose of this paper is to present new methodological tools to trace the beginning of a change process* in interfirm relationships. The use of these tools is exemplified by case studies in business travel management and its core relationships, which are investigated from the buyer organization’s perspective.

A process exists between two points in time, even though it may not always be observable (Tuttle, 1997). However, it is not always easy to define when a process starts, or when it is complemented. In organizational studies, brainstorming may be used to create a list of important events (cf. Isabella, 1988) as an impulse for a change. Schein (1985) notes that events are critical when perceived as such by the informants themselves. They can be seen as temporally specific events that have an impact on relationship development (cf. Halinen et al., 1999; Halinen, 1997). The events may represent crossroads or turning points in the relationships (cf. directive incidents proposed by Edvardsson and Strandvik, 2000; see also Edvardsson, 1988; Gremler, 2004; Roos, 2002). The informants and their interpretations also determine which events are responded and acted upon in other connected relationships. (cf. Havila and Salmi, 2000; Halinen et al., 1999)

The *processual perspective* (cf. Dawson, 1997) to change addresses the question of how change occurs, i.e. the nature, sequence, and order of events and activities that unfold over time (Halinen, 1996). This perspective has been used, for example, by Ford (1980), who analyses relationship development in five stages, and by Dwyer et al. (1987), who describe relationship development as a process of deepening dependence. In the service sector, processual perspective is used by Halinen (1994), who conducted a longitudinal study in professional services. The basic idea of processual research is that organizations may be researched as a continuing system with a past, a present and a future. In accordance with the interactive view, “the actions of a single company are based on “*its interpretation of the previous actions of specific others and on its anticipation of the possible re-actions and re-reactions of those specific others in the future*” (Ford and Håkansson, 2006: 4).

The contextual setting and the timing are important, because of the continuous changes as well in the organizational and relational conditions (Jahre and Fabbe-Costes, 2005; Halinen and Törnroos, 2005; Halinen, 1994). Time sets a reference frame for “*what changes are seen and how those changes are explained*” (Pettigrew, 1990: 271). However, a lack of knowledge in terms of how time affects businesses is acknowledged by several researchers (Quintens

and Matthyssens, 2010; Plakoyiannaki and Saren, 2006; Halinen and Törnroos, 2005; Medlin, 2004). Quintens and Matthyssens (2010) propose three main reasons for the lack of temporal research. First, time is always a part of the reality which is observed (see also Zaheer et al, 1999), thus, time is a social construction (Pettigrew, 1990). Second, time is perceived differently by the researchers (cf. Hedaa and Törnroos, 2002; Halinen and Törnroos, 1995). Third, time is incorporated in theories and empirical models of firm dynamics with practically no attention about time, as time is a multifaceted phenomenon that is difficult to measure and model.

Longitudinal case research is recommended when studying processes (Pettigrew, 1997; Stevens and Dimitriadis, 2004). *The retrospective processual approach* helps in revealing the complexity and the process nature of business relationships. Weick (1979; 2001) states that many processes include elements, that may best be captured first after the process has been brought to a close, or it has reached a given point. Furthermore, he argues that “*all understanding originates in reflection and looking backward.*” (1979: 194) The perceived world is actually the past world, because things are seen and visualized before they are conceptualized and “*people know what they have done only after they do it.*” (Weick, 2001: 462)

The rest of the paper is devoted to case studies conducted in the business travel industry. First, the research setting and the informants are presented. The second section explains the chosen techniques: critical interview technique and visual aids. In the third section, the events as change impulses are discussed. The fourth section deals with the timing of change processes. Finally, conclusions, limitations and avenues for further research will be discussed.

CASE STUDIES IN THE BUSINESS TRAVEL MANAGEMENT

The empirical context of this study is business travel management. Case studies within its core relationships are used to exemplify the change processes. Business travel industry is coping with perishable services where the network and relationships are important. From the buyer organization’s point of view, the most important relationships in the network are those with travel agencies, and service suppliers, such as airline companies and hotels.

Case-based research is recommended when the aim is to understand the process by which specific relationships develop over time (Håkansson, 1982; Dubois and Gadde, 2002; Halinen and Törnroos, 2005). Case studies in a network context give a full and rich description of a network of relationships between a multitude of events and factors (Gummesson, 2001; Halinen and Törnroos, 2005). The case approach allows detailed study of particular events over time, which can reveal the dynamics of business network processes (Easton, 2010).

The research setting and the informants

Purposive sampling was applied to select the cases. This strategy comes close to intensity sampling, which involves collecting information-rich cases that are excellent or rich examples of the phenomenon of interest, but not unusual or extreme cases (cf. extreme or deviant case sampling; Lincoln and Guba, 1985; Patton, 1990). The buyer organization, an industrial enterprise, was taken as a starting point when selecting the focal firms. It is the industrial enterprise that chooses the partners with whom to co-operate. The travel manager

was the key informant (cf. Patton, 1990: 263) who acted as a “gate opener” that paved the way to the other informants. Her most important partner organizations, and her contact persons in those organizations, were chosen to be interviewed. None of the contacted persons refused being interviewed. As a result, eleven dyadic relationships were investigated. The key ethical issue is to ensure that the firms and the individual informants are disguised to assure anonymity. Therefore, their names or other details of the organizations, or of the individual informants, are not revealed. In the organizational level, the relationships exist between:

- Industrial enterprise – travel agency 1
- Industrial enterprise – airline A
- Industrial enterprise – airline B
- Industrial enterprise – hotel chain
- Industrial enterprise – travel agency 2
- Travel agency 1 – airline A
- Travel agency 1 – airline B
- Travel agency 1 – hotel chain
- Travel agency 2 – airline A
- Travel agency 2 – airline B
- Travel agency 2 – hotel chain

These relationships were established to co-operate within the industrial enterprise’s travel management process. Thus, also the suppliers and the travel agencies were co-operating. All the actors were during the investigated period actively relate to each other through business, social and technological exchange (cf. Halinen and Törnroos, 2005: 1288)

The informants were chosen from different organizational levels in order to gain a more comprehensive picture of their co-operation. A business *traveler* was chosen to give “a second opinion” on behalf of the industrial enterprise. The *general manager* and the *district manager* represent the travel agency 1, and the *Nordic manager* and the *operation manager* the travel agency 2. The *clerk* worked first for the travel agency 1 and changed later to the travel manager 2 along with a new contract. Thus, she represents both the agencies, and comments for them both. She also worked for a local travel agency with which the industrial enterprise co-operated before the investigated period. The airline (airline A and B) informants, the *account manager* and the *sales director*, and the hotel chain informant, the *sales manager*, are the travel manager’s contact persons with whom the co-operation is arranged.

Many empirical studies on interfirm relationships rely on data collected from one informant at each of the participating organizations, even though interfirm relationships involve active participation of several individuals within each partner organization. However, the organizations may have contradictory objectives and individuals may have varying perceptions of the role and performance of the relationship. (Palakshappa and Gordon, 2006) It is important to include several individuals from an organization in the study, because the informants view the focal phenomenon from different perspectives (cf. Eisenhardt and Graebner, 2007). Traditionally, in business relationship studies, CEOs and top management informants are used. However, including informants that are involved in daily contact with the other companies provides insights into the short-time interactive processes and their outcomes (Holmlund, 2004).

Medlin and Törnroos (2007) notice the lack of distinction between the firm and individuals as actors, and claim that the role of individuals has been underestimated in the interaction and network approach. The current study emphasizes that it is the individuals who act on behalf of their employers. They describe the specific events, using terms “organization”, “company”, and “employer”, indicating that they represent their employers. They also used personal pronouns, I, she/he, we, as more personal meanings. (cf. Isabella, 1988)

Critical interview technique and visual aids

Retrospective processual case studies with the help of *critical interview technique* were conducted to trace the beginning of change processes in the core relationships (Chell, 2004). The technique bases on Flanagan (1954), but assumes a phenomenological approach in contrast to the more positivistic approach that was dominant in Flanagan’s time. Ten interviews, lasting from 1 hour to 2,5 hours, were conducted. The informants were asked to express specific events that have functioned as change impulses in the focal relationships. The aim of the technique is to capture the thought process, the frame of reference, and the feelings about a happening that has meaning to the respondent. Chell (2004) defines the critical interview technique in the following way:

The critical interview technique is a qualitative interview procedure, which facilitates the investigation of significant occurrences (events, incidents, processes or issues), identified by the respondent, the way they are managed, and the outcomes in terms of perceived effects. The objective is to gain an understanding of the incident from the perspective of the individual, taking into account cognitive, affective and behavioural elements. (Chell, 2004: 48)

The qualitative interview is an exclusively sensitive and powerful method for capturing the experiences and lived meanings of the informants’ everyday world. Interviews allow the informants to express to others their own perspective in their own words (Kvale, 1996). An advantage of the critical interview technique is that the linkage between *context, strategy and outcomes* is more readily teased out because the technique is focused on an event, which is explained in relation to what happened, why it happened, how it was handled, and what the consequences were. (Chell, 2004)

Chell (2004) suggests using a visual aid to get informants to think about the sequence of events that have emerged over time. The visual aid helps to focus the interview, exercise the memory, and enables to get a sense of the nature and chronology of the events. When beginning the interview, each of the informants was given empty diagrams with two axes. They were advised to visualize the development of the relationships in which they were involved. On the time axis, they illustrated the events, and on the vertical axis, their consequences in terms of changes in the closeness and distance of the relationship. Figure 1 provides an example of a visual aid created in an interview with a travel agency informant.

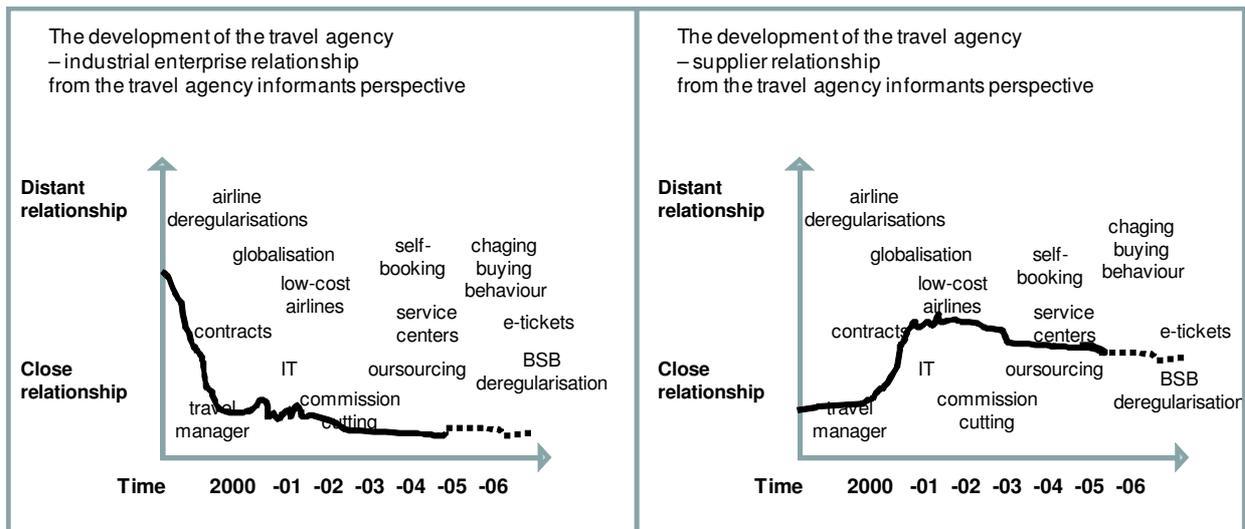


Figure 1 An example of the visual aid.

The informants memorized the events in their own terms allowing them to determine which of them are the most relevant. They were mainly describing the same events, colored with their own perspectives and experiences. Some of the informants chose to tell a chronological story, starting from the early 1980s, and ending up forecasting the future trends (as I had expected them to do). However, some of the informants worked backwards, marking events along the length of the axis, and some of them remembered the events out of order. The illustrations helped to structure the interviews, and to get a time frame to the change processes.

Intertwined events as change impulses

The informants and their understanding determined which events were responded and acted upon in the interfirm relationships. (cf. Havila and Salmi, 2000; Halinen et al., 1999) A number of events were discussed in the interviews. However, the separate events the informants described did not as such lead to change processes. They were intertwined (cf. Hedaa & Törnroos, 1997), and a number of simultaneous, or successive impulses, were a reason for a more wide-ranging change process. For example, airline deregularization, and thereby increasing competition in the travel industry, was an event that had an impact on all the change processes. The airline industry had been traditionally extremely regulated with national quotas on flight capacity and fixed prices. Along with deregulation, certain types of discount fares were allowed (Fridström et al., 2004; Lindstädt and Hauser, 2004; Mason and Alamdari, 2007), and the rate structure became extremely complicated:

The frequently mentioned events, those that were discussed in every interview, were arranged into four categories. These categories were named change impulses: (1) saving campaign, (2) new sales channel, (3) change in earning logic, and (4) convergence of business and leisure travel (see table 1). The change impulses were compared to the visual aids in order to place them in the time axe. The four impulses include events that all the informants discussed, and regarded as important.

Table 1 Interview themes arranged to change impulses.

<i>IMPULSE</i>	1. Saving campaign	2. New sales channel
<i>Events</i>	Airline deregularization Business class travel Bypassing intermediaries Centralizing travel purchase Changing buying behavior Commission cuttings Contracts Control Coordination Cost saving Economy class travel Global distribution systems Globalization Increasing competition Management reporting Money spent New roles Outsourcing Partnership Personal relationships Reducing yield Resources Total costs Travel manager Travel policy	Airline deregularization BSP (billing and settlement plan) Bypassing intermediaries Changing buying behavior Competition Control Coordination Cost saving Efficiency E-tickets Ground services Information exchange Internet bookings Internet surfing Internet travel agencies Low-cost carriers Management reporting Multiple services Outsourcing Personal relationships Recession Resources Sales channel fragmentation Self booking Service centers Technology development Use of time Virtual meetings
<i>IMPULSE</i>	3. Change in earning logic	4. Business and leisure travel convergence
<i>Events</i>	Airline deregularization Bypassing intermediaries Changing buying behavior Changing roles Commissions Competition Consulting Control Cost saving Fair play From suppliers' to client's side Information exchange New roles Override commissions Recession Transparency, Open books Travel agency as advisor	Airline deregularization Business travel becomes commonplace Business travel is hard work, no glamour Bypassing intermediaries Changing buying behavior Competition Control Convenience in travel Cost saving Crosswise tickets Flexible tickets Inexpensive tickets Leisure travelers Loosing volume benefits No use to concentrate purchase No-show seats Restrictions, Rules Weekend prices

The importance of an event

The question of which events may be considered as important is finally dependent on the individual's perspective. Change impulses discovered in the current case studies were endogenous, arising from the individual firms and from the dyadic relationships between them, or exogenous, having their origins in the primary business network, i.e. the industry specific network. The change also emerged from the macro environment, i.e. the other industries, and society as a whole (cf. Anderson et al., 1994; Håkansson and Snehota, 1995). They imply, for example, internationalization, technology development, competition, information exchange, deregularization, industry chocks, and changing consumer habits, to mention a few. Finally, a change process is a combination of endogenous and exogenous events. Figure 2 visualizes the focal relationships, and the wider network in which they are embedded. The primary network is placed inside the dotted elliptical line, and the macro network outside this line. The double-headed arrows visualize the dyadic relationships between the firms.

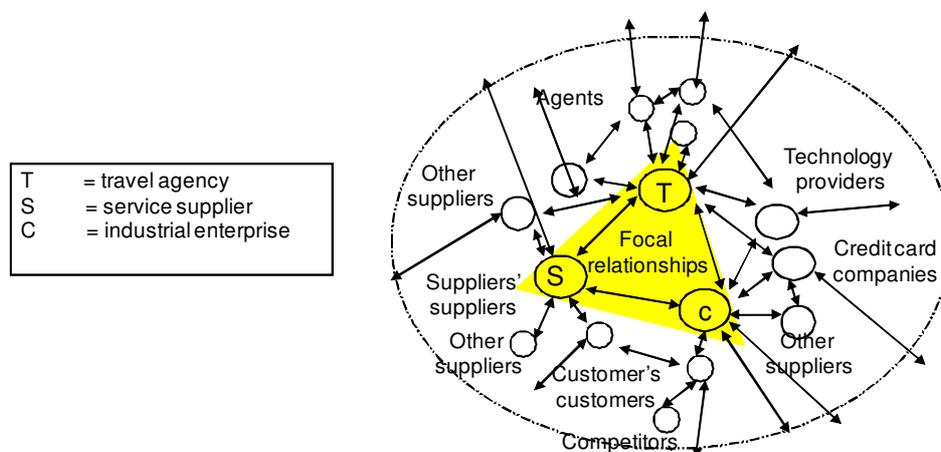


Figure 2 The focal relationships embedded in the wider network.

In the interviews, the informants described the beginning of a process by comparing the situation before and after the change. They often included expressions like: “we had to do something”, “new possibilities were utilized”, “something was needed more/less than earlier”, and “things are not as they used to be”. Some examples are provided in the following.

The internationalization of the industrial enterprise's operations, and thereby the growing of business travel, motivated the starting up of the saving campaign. Furthermore, deregularization led to more price alternatives, and required control in travel purchase in order to obtain savings. Travel management is an important support function for the industrial enterprise, and it was one of the major saving targets:

We had to somehow concentrate on all the countries to which we were travelling. To get it managed in a reasonable way, to get a common policy, common partners, and common reporting. (Traveler)

The nature of the core relationships changed as the industrial enterprise organized the travel management function, and started to apply relational exchange instead of transactional. Many relationships in the personal level ended, and new relationships were established. The case organizations were chosen as preferred partners.

The impulses for the new sales channel and the change in the earning logics were mainly exogenous, originating from the primary network. They were intertwined, and the new earning logics may be seen as a sub-process of the new sales channel. They were enabled by technological development and increasing competition in the travel industry. Also competition between the travel agencies and the suppliers, specifically the airlines, increased:

Service suppliers saw a lot of possibilities to bypass delivery channels. (Airline B, director)

It is not only the other business travel agencies that are our competitors. Today, everybody is a competitor with each other, airline companies and all the partners are competitors with each other. (Travel agency 1, district manager)

The convergence of business and leisure travel was an event taking place in the macro network. The consumption habits changed, and business travel became an everyday routine:

today travel is commonplace, it is like taking a bus...there are a lot of companies that see business travel as a tool, it is done businesslike and safe, but it does not have to be luxurious. This implies all the travel related services, car-hire, hotels, ferries, flights, and so on. (Travel manager)

This added the travel agencies' value in the distribution network. The travellers were advised to use services directed to leisure travelers, which was complicated:

because of the jungle of rates, we are needed even more than earlier. (Travel agency 1, district manager)

Abandoned events

The impulses were used as “the window” through which to look at the change process, its content, its specific features, and its impact on the relationships. Choosing the events the informants regarded as important ensured that there is a view opening from the window. There were also events that the informants discussed, but they were not specific turning points in the core relationships. An example is the industrial enterprise's new business site. Because the core firms operate internationally, the disappearance of an individual business site, or the birth of a new one, does not cause major changes. Small, local service suppliers, on their part, would be more likely to suffer:

As a whole, our travel is so spread out around the world that small changes have an impact on the local hotels, for example, if the flow of travelers stop coming...if we have filled the hotel, let's say 70 %, it is a big issue for the hotel...But to the airline carriers, because we have divided our flights between several carriers, because our destinations cover the whole world, it is not a big issue. (Travel manager)

Some of the impulses were regarded as important by one informant, but unimportant by another informant, for example, airline alliances. Airline informants think they have changed the relationships, but the travel manager disagrees:

Airline alliances are useful when it comes to the bonus-systems and lounges and marketing. But all the basic things never came true. Each of them [the airlines] has

built an identical organization in every country in which they are operating. Therefore, an airline is competing with itself [in different countries] because all the countries want the sales. (Travel manager)

Furthermore, the perceptions of a specific event's importance may differ. For example, the travel agency clerk is often worried for the travelers' safety and security, meanwhile the travel manager looks at the safety problem from a different perspective:

The most devastating event was probably the twin towers [11 September, 2001], that was a shock to the whole world...Then there are, for example, civil wars taking place when you have to get travelers home from the country as soon as possible. It is nearly as if you were there yourself...Then you will co-operate [with the airlines and the client] to get the traveler back home. We only talk about money later on when everybody is safe. (Clerk)

However, a differing view is that,

Employees who deliver newsletters and security plans of risk areas and areas where traveling should be restricted, are the right source... a travel agency is not the right place to take on the responsibility for the lives of the travelers. (Travel manager)

Timing of the change processes

The timing of the change processes is in the current study defined by the individual informants. They memorized the events, put them in the time line, and considered if the event was an impulse for a change process by describing the consequences of the event. Figure 3 is an attempt to illustrate the approximate timing of the change processes in the current case studies. Two processes, due to (1) the saving campaign and (3) the change in earning logics are illustrated by a rectangle, because they were *time-framed and planned processes*. However, the beginning of a change process is not always easy to define, and specifically when it is complemented. The (2) change in earning logic and the (4) business and leisure travel convergence led to *evolving processes*, and they are illustrated by using elliptical shapes.

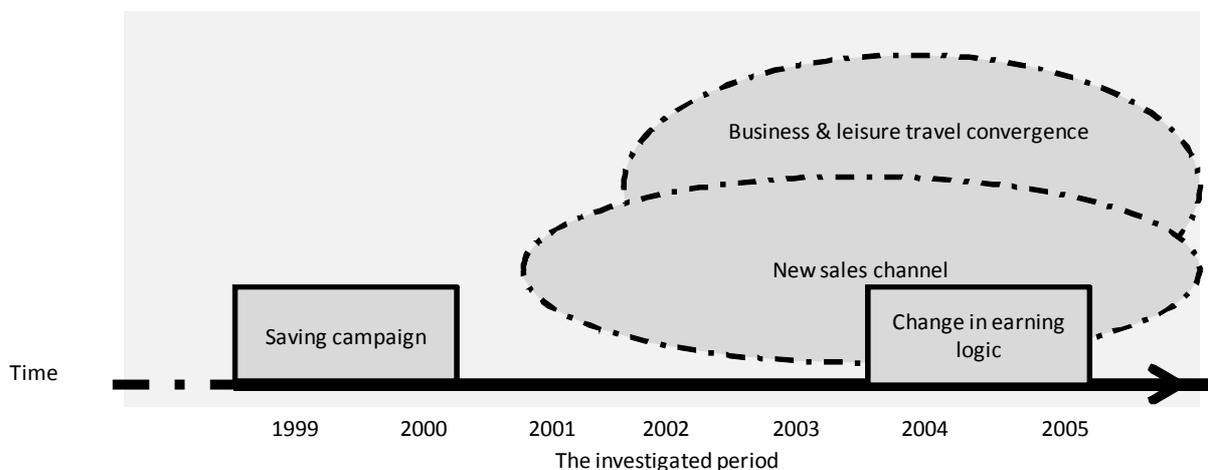


Figure 3 A visualization of the time frames of the change processes.

SUMMARY AND CONCLUSIONS

This study provides three major contributions to the limited understanding of process characteristics of interaction and network research. First, it addresses *the techniques of how to trace the beginning of a process*. Retrospective processual case studies are applied in the dynamic business travel industry relationships. Critical interview technique (Chell, 2004) and visual aids, where the informants describe events that they see as turning points in the core relationships, are used as tools to trace the initiation of a change process.

Second, the current study takes into consideration the *time perspective* in the change processes. The events were categorized into four major change processes. The informants outlined the time line of the events with the help of the visual aids by drawings with a time axe, and an axe describing the change that occurs in the relationships due to a specific event. The visual aids constructed by the informants help in setting the change processes into an approximate time line. Two of these processes are time-framed from the very beginning, i.e. they have a beginning and an end. The remaining two change processes are evolving, and their beginning is difficult to define precisely. Furthermore, they do not have an end, but they are processes that change the core relationships continuous.

Third, the study makes a distinction between the firm and the *individuals as actors* (cf. Medlin and Törnroos, 2007). Several knowledgeable individuals from different organizational levels in the co-operating firms were interviewed. Furthermore, because the firms, and the individual informants are co-operating partners at the time of the research is conducted, multiple perspectives are applied by looking at the specific change processes from the “both ends” of the relationship.

Limitations and further research

This study presents one way to study processes, and to trace their beginnings. Processual case studies were applied. *Longitudinal research* and the analysis of data collected at different points of time, or an ethnographic, or an action research approach would have been alternatives. However, a process may engage different actors at different points of time, and the right moment to collect data would have been difficult to specify beforehand in a longitudinal, or in an action research study.

Brennan et al. (2003) suggest *co-interview techniques* where the informants are interviewed simultaneously. This would create the opportunity to address directly the possible conflicting views that the exchange partners may hold about the nature and the importance of adaptations in specific relationships. This approach, however, causes difficulties in practical details, because it is impossible to find a time that would suit the informants. Furthermore, the informants express themselves more freely when the counterparts are not present, and the conflicting views would probably not have been solved by discussing them openly.

In the current case studies, the events, and the change impulses, are rather *generic and universal*. They are not sudden, and they do not arise from individual specific, or firm specific occasions. *The impulses describe rather the general developments of the relationships than partner-specific developments*. The industrial enterprise was taken as a starting point when selecting the firms and the informants. The industrial enterprise is a powerful actor. The travel manager chooses the partner firms, and requires similar kinds of

services and adaptations from its partners. Thus, the relations with the suppliers and the travel agencies face similar challenges, i.e. the relationships with the two travel agencies, and with the three suppliers, follow the same principles, and it is the same events that change the relationships.

Another reason for the generic change processes may derive from the informants themselves. First, they concentrated on the common events because of their vast experience in different positions in the business travel industry, and because their interest in the development of the industry. Second, the informants were co-operating partners at the time of the interviews. Generally, it is not easy to collect data from the actual buyer, seller, and intermediary counterparts to specific relationships because of the opaque nature of the business relationships (see e.g. Trimarchi and Tamaschke, 2004: 341). Håkansson (1982) also noticed that trying to do it might lead to resistance from firms, because it could interfere with their business with each other. It may have been easier for them to discuss these generic issues than individual specific, or firm specific issues.

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