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The individual side of ambidexterity: Do individuals' perceptions match actual behaviors in reconciling the exploration and exploitation trade-off?

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ABSTRACT

The paper addresses the issue of the exploration–exploitation dilemma, adopting a micro level of analysis. Unlike the extensive literature on ambidexterity that investigates the organizational solutions that allow firms to pursue the balance between the two kinds of learning orientation, this research draws attention to the as yet barely analyzed individual dimension of ambidexterity. Specifically, in investigating personal ambidexterity we point to the relevance of individuals' perceptions on what their role requires of them and the actual behaviors they perform.

Drawing on an inductive multiple case study carried out on managers who face daily a strong pressure to balance exploration and exploitation and are expected to perform ambidextrous behaviors, we identify four different situations at the individual level, depending on the consistency/inconsistency between individuals' role perceptions and their actual behaviors: enacted personal ambidexterity, dominant learning orientation, perceived personal ambidexterity and full personal ambidexterity. Moreover, our study adds to the ambidexterity literature by suggesting theoretical propositions on how individual characteristics, namely prior work experience and behavioral competency profile, may impact on the different situations of personal ambidexterity we identified and how the consistency/inconsistency between individuals' perceptions and behaviors may contribute to sustaining or jeopardizing full personal ambidexterity.

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Introduction

The ability of a firm to exploit its current competencies as well as to explore new opportunities represents the core of organizational learning. However, due to the incompatible nature of the exploitative and exploratory activities (March, 1991), the trade-off to pursue both these kinds of learning orientation has been tackled for a long time, suggesting different ambidextrous organizational solutions: structural, sequential and contextual ambidexterity (Gibson & Birkinshaw, 2004; Siggelkow & Levinthal, 2003; Tushman & O'Reilly, 1996). Despite the valuable insights that this body of literature has provided, a main limitation can be highlighted. These studies, adopting the firm level of analysis, implicitly assume homogeneity at the individual level, neglecting how the organizational members might influence the firm's ability to pursue a balance between exploration and exploitation

The contributions of the behavioral theory of the firm (Cyert & March, 1963; March & Simon, 1958; Simon, 1985), reinforced by

the recent debate on the micro-level origins of a firm's capabilities (Felin, Foss, Heimeriks, & Madsen, 2012; Foss, 2011), have shown that the individuals' characteristics are important antecedents of the development of organizational capabilities. In addition, recent literature reviews on ambidexterity have called for research spanning multiple levels of analysis (Raisch & Birkinshaw, 2008; Raisch, Birkinshaw, Probst, & Tushman, 2009; Rosing, Frese, & Bausch, 2011; Turner, Swart, & Maylor, 2012). However, only few studies have delved into the micro-foundation of ambidexterity. These contributions point to the relevance of the individual characteristics as well as preferences in orientating the performance of exploratory and exploitative activities.

This paper maintains the explanatory relevance of a more fine-grained level of analysis in studying ambidexterity since, according to Raisch et al. (2009), investigating further the individual side of ambidexterity (*personal ambidexterity*) may contribute to understanding how to balance exploration and exploitation within a unit or firm (*organizational ambidexterity*). First, as suggested by prior contributions, even if individuals could correctly perceive the kind of learning orientation expected by their role (people's perceptions of what their job requests of them), at the same time they might

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not activate consistent behaviors in their daily activities since they may not be able to face the challenge of reconciling dual demands (Gupta, Smith, & Shalley, 2006; Raisch et al., 2009). Second, research on role theory (Katz & Kahn, 1966) and cognitive dissonance theory (Festinger, 1957) shows that when perceptions are consistent with actual behaviors individuals tend to be more satisfied and to perform more. Such a complex relationship between individuals' role perceptions on what they are expected to perform and their actual behaviors suggests that both these two different dimensions should be considered in investigating personal ambidexterity. Moreover, if ambidexterity at the individual level may present different facets according to the consistency/inconsistency between role perceptions and actual behaviors, a further advantage of adopting the micro level of analysis is the possibility to investigate those personal characteristics that favor individuals to be ambidextrous not only in their perceptions but also in their actions. As argued in prior research, the possession of personal characteristics (such as technical competence) moderate the relationship between task characteristics and role perceptions, as well as leading to a more efficient and effective performance of behaviors (Gilbert, De Winne, & Sels, 2011). Although ambidexterity literature acknowledges that ambidextrous individuals have to fulfill different and contradictory activities, what makes individuals correctly perceive their ambidextrous role and behave consistently is still an open issue. Accordingly, the research questions addressed in this paper are: (a) how can ambidexterity at individual level be detected and classified? (b) how may individual characteristics contribute to achieving personal ambidexterity?

Our contribution is twofold. First, we add to the studies on personal ambidexterity by proposing a classification of ambidexterity at individual level which depends on the comparison between the individual's perceptions and behaviors. Second, the paper offers new insights into the role of individual characteristics that explain why individuals may or may not perceive that a balance between exploration and exploitation is expected from them and may or may not perform a consistent behavior. From the analysis of the empirical evidence we have developed some propositions that can be further tested in future research.

In order to answer our research questions and to build novel theory on personal ambidexterity, we carried out an inductive multiple case study (Eisenhardt, 1989) on individuals who face daily a strong pressure to balance exploration and exploitation and are expected to perform ambidextrous behaviors.

This paper is organized as follows: the following section introduces the notion of personal ambidexterity against the backdrop of previous research targeting the organizational level of analysis. The method section provides details about the cases, data collection and data analysis. Next, we present the empirical evidence illustrating the classification of personal ambidexterity we propose, and we explain the factors that may impact on the challenge to reconcile both exploration and exploitation at the individual level. Finally, we conclude with a discussion of the results, implications, and directions for further research.

Towards a personal ambidexterity approach

Overview of the extant literature on organizational ambidexterity

Organizational ambidexterity is the firm's capability to pursue learning through two apparently conflicting sets of activities: exploiting existing competencies and exploring new opportunities. According to March's original article, learning through exploitative activities requires the performance of refinement, choice, production, efficiency, selection, implementation, and execution; whereas

learning through explorative activities implies search, variation, risk taking, experimentation, flexibility, discovery, and innovation (March, 1991: 71).

Empirical research has found support for the positive effect of the balance between these two learning orientation both on innovation output and on firm performance (e.g. Chang & Hughes, 2012; Danneels, 2002; Gibson & Birkinshaw, 2004; Tushman & O'Reilly, 1996). For instance, Katila and Ahujia (2002) showed that the interaction between exploration and exploitation has a positive impact on new-product development. In their study, He and Wong (2004) found that firms that pursue both exploration and exploitation simultaneously achieve higher sales performance. These findings support the general agreement that "variance does not generate returns without some efforts to fix and develop the new knowledge" (McGrath, 2001: 119). Indeed, an overreliance on exploration, which generates both higher potential benefits and higher potential costs, may cause the firm to operate with less efficiency since it is constantly renewing its knowledge base without fully utilizing it (Levinthal & March, 1993). On the other hand, a firm that shows an exclusive focus on exploitative learning, whose returns are more certain, immediate, and familiar, may risk the obsolescence of its knowledge base.

Despite this positive and complementary interplay between exploration and exploitation, scholars have long noted that firms face difficulties in achieving the balance between the two kinds of learning orientation, in that they involve different kinds of cognitive orientation that can create paradoxical challenges (Levinthal & March, 1993).

As pinpointed by a recent bibliometric analysis (Nosella, Cantarello, & Filippini, 2012), the literature has primarily adopted a macro-level of analysis identifying the possible organizational solutions that orientate behaviors towards a balanced learning: structural ambidexterity, cycling or sequential ambidexterity and contextual ambidexterity (Gupta et al., 2006; Raisch & Birkinshaw, 2008; Raisch et al., 2009). In all these approaches, scholars adopt the concept of *organizational ambidexterity*, thus measuring it at the firm level, investigating how the firm divides attention and resources between exploratory activities versus exploitative activities. For instance, they analyze the level of intensity of introducing new generations of products vs. improving existing products, or opening up new markets vs. enhancing existing markets (Cao, Simsek, & Zhang, 2010; He & Wong, 2004; Jansen, Van den Bosch, & Volberda, 2006; Lubatkin, Simsek, Ling, & Veiga, 2006).

The first approach, structural ambidexterity, suggests that in order to achieve exploration and exploitation firms could design a dual architecture (spatial separation) in which some units are organized to be efficient while others are organized to experiment and improvise (Benner & Tushman, 2003; Tushman & O'Reilly, 1996). In accordance with this approach, research identifies the competencies, systems, incentives, processes and cultures that are peculiar to the independent units each devoted to one of the two mutually exclusive kinds of learning orientation (O'Reilly and Tushman, 2008). Adopting the same logic of differentiation, sequential ambidexterity implies a temporal separation between long periods of exploitation and short bursts of exploration (Burgelman, 2002; Siggelkow & Levinthal, 2003).

A different approach is provided by contextual ambidexterity, defined by Gibson and Birkinshaw (2004: 209) as "the behavioral capacity to reconcile simultaneously both exploration and exploitation across an entire business unit". According to this approach, exploration and exploitation are achieved simultaneously, since individuals make their own choice about how to divide their time and tasks between exploratory and exploitative activities, for instance between an existing customer or a new one. These studies

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