CHAPTER 19

TOWARDS A THEORY OF MICRO-INSTITUTIONAL PROCESSES: FORGOTTEN ROOTS, LINKS TO SOCIAL-PSYCHOLOGICAL RESEARCH, AND NEW IDEAS

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ABSTRACT

In this chapter, the authors weave together a set of ideas that lead us closer to a more general institutional theory – one that embraces multiple levels of analysis, including the micro-level. The authors build on the roots of micro-institutional thought – including phenomenological and ethnomethodological underpinnings – as well as very active, social-psychological research areas that address key mechanisms in institutionalization. Among these, the authors discuss the important roles of legitimacy, trust, social influence, and routines. There is great promise for micro-institutional inquiry to make an integral contribution to institutional theory by bringing processes and people back in.

 Keywords: Institutional theory; micro-institutionalism; legitimacy; trust; routines; experiments

One of the most remarkable developments in contemporary institutional theory is the rediscovery of micro-level processes – by which we mean to encompass

those that operate below the organization's institutional context, including (but not limited to) intraorganizational phenomena, groups, and yes, to be absolutely clear, individuals and their interactions. In this chapter, we adopt a relatively broad scope, as we are largely agnostic about whether scholars study macro-to-micro causation, micro-to-macro aggregation, or simply phenomena at the micro-level alone that contribute to understanding institutionalization processes, and we subsume all these important efforts under the umbrella of micro-institutional inquiry (Schneiberg & Clemens, 2006; Tolbert & Zucker, 1996; Zucker, 1977, 1991). Importantly, we agree with Barney and Felin (2013), Selznick (1996), and many others that a micro-level approach is highly complementary with – rather than substitutive for – a macro-agenda, since shedding light on the micro will help to better understand the effects and the origins of the macro.

We are glad to witness micro-level research increasingly moving to the forefront of contemporary institutional theory. This trend clearly has helped to "deinstitutionalize" the institutional theory of the 1990s (Tolbert & Zucker, 1996) and to address important criticisms about institutional theory's standard practice of "black boxing" what's inside the organization and viewing the source of organizational behavior as entirely exogenous (Gavetti, Levinthal, & Ocasio, 2007; King, Felin, & Whetten, 2010; Zilber, 2016; Zucker, 1983, 1991).

Let us begin by defining a few basic terms. Micro-institutional process focuses on persons' role in substantiating creation, growth or decline, and death of institutions. Microfoundation draws attention to the dual role of persons in shaping – and being shaped – by institutions at all levels of the social system, from small groups to organizations to nation states to worldwide bodies. The range of actions may differ significantly by level, such that organizations across nearly all types, for example, can act in ways that individuals outside organizations cannot. These include actions legitimated for organizations but not for other types of entities (Coleman, 1988), yet the actual action is still fundamentally substantiated or changed by a person or group of persons, and in some cases actively authorized by a legitimated sub-group (committee, department, etc.).

THINKING IN A MULTI-MECHANISM FRAMEWORK

The fundamental premise of our approach is that only through studying micro-institutional phenomena can we grasp the mechanisms involved in the creation, modification, and transmission of institutions and the reasons for their relatively high rate of maintenance and resistance to change. Leaving out these crucial issues would give us an institutional theory devoid of explanatory causal process accounts and unable to explain heterogeneity. As a point of departure, we suggest that actors tend to start with "recipes" that sketch out a set of knowledge or actions that enables them to "live" an institutional process (Schutz, 1967). However, while using old recipes is a short-cut that makes the process more efficient, inventing new ideas is central. Such new elements and practices may over time become taken for granted, part of a recipe, or shaping a new recipe (P. L. Berger & Luckmann, 1966; Garfinkel, 1967).

We will develop the following further as crucial causal elements in our theory: (1) Fundamental mechanisms already in place that can serve as the seed elements enabling building of new mechanisms, focusing here on legitimacy, trust, social influence and routines; (2) Institutionalized building blocks, where not all can be chosen (to fit together, certain pieces can be selected, but not others), and the reframing of these, allowing sudden redefinition, to flesh out "recipes" for an institutional element or sector; and (3) Switches that can be continuous or discrete (on-off) that determine whether specific mechanisms and building blocks are switched on, off, or in between.

The social psychological concepts are the social glue that bind relationships, or the forces that pull them apart. To use a puzzle analogy as Figure 1 illustrates, these processes define how the individual puzzle pieces fit together. If you turn a puzzle over, so that no picture or color cues exist to help you structure the whole, you look at the shape of individual puzzle piece to see which pieces might fit together – a slow process – and experimentally try out various combinations. There is a lot of trial and error, and hence search is inefficient. Looking for short-cuts (edge pieces; repeat patterns) is part of puzzle solving strategy, with returns to puzzle constructors who cleverly provide new clues.

But the overall design, the picture itself and its colors, are defined by what are called in puzzle circles "whimsies," those pieces that are evocative of the overall theme (sailboat shape for sea; horse shape for horse racing, and other related pieces such as horseshoes and shells). These whimsies provide the equivalent of institutional context by identifying, even upside down with no color, the institutional location. Figure 1 illustrates these concepts through our puzzle analogy.

Fig. 1. Decomposition to Recomposition: New Ideas (Courtesy of Liberty Puzzles).

Our knowledge as observers varies widely across puzzles. Some reflect internally shared content, not public. Other knowledge is widespread. Expectations, thought of here as ability to predict the next action not yet completed or next scene, vary in completeness and in accuracy. We can imagine the bank customer role well, but not the bank official without knowledge of insider expectations.

In the above examples, taken collectively, we have contexts that differentiate clearly or obfuscate, contexts that overlap, and contexts that conflict. The most fundamental, generalizing institutional logics tie the mechanisms (trust, reputation, etc.) to the institutional nexus in which these are active or moribund, and grant rights to the more structural aspects of institutions, such as rule or classification making, along with boundaries that delineate where these processes are legitimate and where not. How long these last, who they involve, and what they invoke all matter for institutional reproduction, including how widespread they become and long run survival rates.

When institutions are supported to survive and replicate, does change become more difficult? Nadel (1957) show us that resistance can be created by increasing interdependencies, an earlier and differently identified embeddedness phenomenon (Granovetter, 1985). But embeddedness, as well as cascades, creates fragility as embedding error increases in likelihood (Bikhchandani, Hirshleifer, & Welch, 1992; Nadel, 1957). Institutional structures sometimes share the embeddedness flaw as they grow large and/or spread widely; interdependent actions may similarly sometimes be made more fragile. The very processes involved in construction of institutions, then, often contain the seeds of their destruction. Birth of new institutions may be eased that way, but it is also true that new institutions may simply outcompete old when performance standards are clear.[1]

Obviously, then, the switching process is crucial, yet we have barely examined it. What do we mean by switching process? Let us use another puzzle example. The "whimsy" choices define the subsequent pieces; the puzzle is built around them. Once we select new whimsy pieces, we have a new puzzle. Yet these pieces may be few. As the puzzle reconfigures around these pieces, though, it may be revolutionary at the end of the process. How does this switching process take place? Garfinkel (1967) gives us some good starting points by looking for where we can redefine easily (e.g., bargain on price in department stores as if it were normal), or not (identify norms that resist change by causing anger at home by simply asking for elaboration of short-hand expressions, such as claiming ignorance when asked to "please take clothes to Carmen's"). By pushing this one more step, asking "what is Carmen's, do you mean Carmen's dry cleaner?"), family or house-mates became angry (sometimes very angry) in Garfinkel's tests.

We are just beginning to understand how these processes are switched on or off, changing when and where these processes are active. The global structure of switches derives from cues that include role, context, or activity, and define a particular institutional domain. When institutionalized, this recipe knowledge (Schutz, 1963, 1964) combines with the output of legitimacy processes, for example, creating a rich, detailed social context. These recipes may be old favorites, or new ways of integrating different "recipes" to yield new designs and new outcomes.

All this implies that institutions are both highly durable and, at the same time, subject to invention and creative redesign that may produce very rapid change that incorporates both processes and recipes that redefine what an organization type is in terms of processes used, recipes adopted, and how these are integrated into a whole. For example, E. T. Walker and Rea (2014) suggest that many corporations now borrow social movement structures and tools. Bottom-line performance and legitimacy of the firm is often enhanced. Schilke (2018) explores the nuances of organizational identity construction by persons in the situation, and shows how that can increase resistance to environmental pressures. We have used an analogy to jigsaw puzzles that portrays graphically how these two parts of social construction – the processes such as routines and the typified recipe knowledge that is widely known and highly institutionalized – or borrowed from some other, very different, area – fit together, and both stabilize and quickly change even the most institutionalized mechanisms and structures.

Much work lies ahead to develop the micro-institutional approach, and in this chapter, we will share some observations and recommendations for scholars embarking on this path. Specifically, we start out by making the important point that micro-institutional inquiry, while it had laid largely dormant for several decades, is all but new. In fact, micro-level processes were essential to seminal theorizing in institutional theory, and we should not miss the opportunity to pick up where these earlier works had left off. It is imperative we acknowledge and draw from institutional theory's foundational works and the sources they built on rather than try to "reinvent the wheel." This will also ensure that contemporary micro-institutional inquiry will be highly aligned with the theory's assumptions and not go astray. At the same time, micro-institutional scholars should of course not be ignorant of what has been achieved in adjacent fields – most notably, social psychology – but rather make good use of these findings as they relate to key processes at the heart of institutional theory. We conclude our backward-looking discussion by calling for greater unification of different strands of ongoing micro-institutional research. Next, we turn to elaborating recommendations for future micro-institutional research, focusing on selected themes that we believe are particularly fruitful and important. We briefly examine the ideas of legitimacy stretching and unembedding, examine the role of error cascades, and discuss the value of experimental methods for institutional theory research.

MICRO-INSTITUTIONAL ROOTS

There are a number of different starting points to new institutional theory (Greenwood, Oliver, Sahlin, & Suddaby, 2008). But what sometimes appears to be underappreciated is that – despite differences in assumptions and emphasis – the social behaviors and cognitive understandings of people play a central role in all these foundational works. For instance, building on P. L. Berger and Luckmann (1966), Meyer and Rowan (1977) insist that institutionalized rules must be understood from the viewpoint of the actors that they impinge upon. "Units within the organization" (p. 351), the organization's "internal participants" (p. 349), as well

as the organizational "leadership" (p. 352) are among the key actors in Meyer and Rowan's (1977) theory of how institutions are processed and strategically leveraged (also see Hallett & Ventresca, 2006). For Meyer and Rowan (1977), individuals making sense of conflicting demands, performing ceremonial actions, absorbing uncertainty, and maintaining confidence are key to understanding institutional effects. Not surprisingly, then, most of their suggested research implications (pp. 360–362) place individual managers, their perceptions, decisions, and resource allocations at center stage.

Similarly, DiMaggio and Powell's (1983) discussion of mimetic isomorphism rests on arguments about "individual efforts to deal rationally with uncertainty" (p. 147) and the "advantages of mimetic behavior in the economy of human action" (p. 151). Moreover, in their model of normative isomorphism, norms are transmitted through employees entering and being socialized into the organization.

Perhaps most pronounced and salient is the micro-level in Zucker's (1977) model. She depicts institutionalization as an active and on-going social construction which shapes people's immediate cognition and resulting action, but can become more taken-for-granted, having a permanence of a social kind (building on P. L. Berger & Luckmann, 1966; Garfinkel, 1967; Schutz, 1962, see also Goffman, 1967).

The important point is that micro-institutional thought isn't new; it has been there from the very inception of new institutional theory but then has been largely neglected in favor of studying macro-phenomena such as field-level isomorphism. As our preceding discussion of Meyer and Rowan (1977), DiMaggio and Powell (1983), and Zucker (1977) makes clear, especially the cognitive mechanisms that underlie institutionalization have been central to initial formulations of institutional theory – and it is about time to further explore, elaborate, and expand on these early micro-institutional ideas.

SOCIAL-PSYCHOLOGICAL FOUNDATIONS

A micro-institutional approach that rests on cognitive processes as fundamental explanations for institutionalization in our view has to necessarily leverage research in social psychology – both in its sociological and psychological variant –, where researchers have made tremendous progress in understanding social cognition over the past four decades. In order not to reinvent the wheel but instead make good use of what this research has accomplished, we should explicitly build on and integrate the insights from these literatures (also see Boxenbaum, 2014; DiMaggio, 1997; DiMaggio & Markus, 2010). It is beyond the scope of this short chapter to offer a comprehensive review of all aspects of social psychology that are relevant to (micro)institutional theory (and we believe there are many), but we would at least like to selectively draw attention to four strands of social psychology that we feel have the potential to significantly enrich future institutional inquiry: the social psychology of legitimacy, trust, social influence, and routines. Below we explore some of these and related processes as bases for new micro-institutional theory and research.

Legitimacy

From its very inception, legitimacy has been a key process for explaining some of the antecedents and outcomes of institutionalization. Indeed, one of institutional theory's central positions originally put forward by Meyer and Rowan (1977, p. 349) is that "(i)ncorporating externally legitimated formal structures increases the commitment of internal participants and external constituents," a key insight later elaborated by Suchman (1995). Despite the centrality of legitimacy in institutional theory, however, a thorough understanding of when and why certain practices are considered legitimate is oftentimes lacking in institutional accounts (Haack, McKinley, Schilke, & Zucker, 2016). That is, institutionalists' treatment of legitimacy as a resource has often been oversimplified, with much attention dedicated to the (desirable) consequences of legitimacy, but an insufficient understanding of where legitimacy comes from and how it evolves over time.

Social psychologists, on the other hand, have meanwhile accumulated a vast amount of knowledge of the process through which a social object is construed as legitimate (e.g., J. Berger, Ridgeway, Fisek, & Norman, 1998; H. A. Walker, 2004; Zelditch, 2001), seeking to answer the question of how a practice can gain and maintain legitimacy. In their comprehensive review of the field of social psychological legitimacy research, Johnson, Dowd, and Ridgeway (2006) identify a model comprising four stages that describe how new objects become legitimated: innovation, local validation, diffusion, and general validation. In the innovation stage, the practice's ability to address some important need is critical, whereas its consistency with existing, widely accepted norms gains center stage in the local validation phase. Once local validation is achieved, a practice may diffuse to other local contexts, where its usefulness is no longer subject to heavy contestation. At this point, the practice is on its way to gaining general validation, which is when it has become part of the status quo. The parallels to the institutional process model of habitualization, objectification, and sedimentation (Tolbert & Zucker, 1996) are apparent, and it would be unfortunate if we would miss the opportunity of cross-fertilization between the two fields. In particular, we believe that greater reliance on social psychological approaches to legitimacy comes with at least four benefits: (1) a decidedly social psychological approach ensures that the cognitive processes underlying the legitimacy concept are better understood, (2) it allows for broadening our investigation to new levels of analysis beyond the field, including the intraorganizational, team, and individual levels, (3) it forces researchers into more formal, less contextual propositions, and (4) it offers useful measures and procedures for empirical inquiry, especially of experimental nature (more on this below).

Trust

Trust, often defined as the "confident positive expectations regarding another's conduct" (Lewicki, McAllister, & Bies, 1998, p. 439), is another mechanism that we believe has much promise in helping bridge the macro and the micro in institutional theory and that has received much attention in social psychological research (Cook, Hardin, & Levi, 2005; Kramer, 1999). Trust is intertwined with

institutionalization in several, oftentimes reciprocal ways, which is why it critical to further elucidate the role that trust plays in institutional theory, especially as we move into its micro-processes. Social psychological research can help us in this regard.

First, it is well known that situations high in institutionalization can elicit trust (Zucker, 1986), given that they are perceived as proper and routine. Institutions are an important basis of trust because they "imply a high degree of taken-for-grantedness which enables shared expectations even between actors who have no mutual experience or history of interaction" (Möllering, 2006, p. 356). High levels of institutionalization may prevent individuals from updating and testing the validity of their trust judgments. Using neuro-imaging methods, Schilke, Reimann, and Cook (2013) find that repeated interactions foster habitualized cognitive processing, which in turn leads people to persist in trusting behaviors even in the presence of defection. In short, trust is an important but often underappreciated consequence of institutionalization.

And vice versa, heightened trust can foster institutionalization (Neal, Shockley, & Schilke, 2015; Tyler, 1997), since trust makes it psychologically comforting and perceived as less risky to keep with the status quo. Once a counterpart is highly trusted, actors can become complacent and no longer scrutinize intentions and likely behaviors. When trust is high, deliberate cognitive processing diminishes – a clear indication that the relationship is taken-for-granted.

These self-reinforcing cycles can not only help us better understand institutional persistence, but also the conditions under which institutional change is possible. For example, blatant breaches in trust may trigger shocks and the deinstitutionalization of existing practices (Lumineau & Schilke, 2018). Similarly, the replacement of trusted individuals (e.g., through turnover) can deinstitutionalize ongoing interactions (Schilke & Cook, 2013; Tolbert, 1988). Despite these important insights, the systematic integration of institutional theory and the social psychology of trust is still in its infancy (Kroeger, 2012) and clearly requires further research attention.

Social Influence

Institutional theory, at its core, is a theory of social influence (Tolbert & Zucker, 1983). Its master hypothesis pertains to how organizations and their decision makers respond to environmental pressures (Scott, 2014; Zucker, 1987), may they be mimetic, normative, or coercive. It is thus surprising, and maybe even shocking, how rarely institutionalists of recent times have explicitly built on social influence research in psychology and sociology (as reviewed, e.g., by Bruch & Feinberg, 2017; Cialdini & Goldstein, 2004; Larrick, 2016). We believe that a richer understanding of the social context of decisions should be a key theme in micro-institutional research, and that this research will have much to gain from social influence scholarship.

For example, a key finding from social influence research in psychology is that people are more likely to adopt a particular practice if others have also done so (e.g., Nolan, Schultz, Cialdini, Goldstein, & Griskevicius, 2008). Sounds familiar?

But psychological social influence research offers much more nuance than that. For instance, it provides a window into the conditions under which mimetic pressures will be particularly strong versus likely to be resisted – a fundamental question of the micro-institutional approach (Schilke, 2018; Zucker, 1991). For instance, perceived social distance between oneself and the other actors has been found to significantly suppress their social influence (Schultz, Nolan, Cialdini, Goldstein, & Griskevicius, 2007), as does temporal distance between one's own decision and others' behaviors (Shang & Croson, 2009).

Similarly, social influence is a central process in various research streams in sociology, and institutional scholars can substantially benefit from leveraging their insights. For instance, social influence is the key mechanism in expectation states theory, which seeks to explain how diffuse status cues can shape the extent to which influence attempts will be successful (Correll & Ridgeway, 2003). Likewise, the sociology of culture has a strong interest in understanding where taste comes from, and Salganik, Dodds, and Watts's (2006) field experiment has impressively shown that social influence is a key source. An active stream in economic sociology is interested in how judgment devices (such as rankings and awards) shape economic behaviors (Karpik, 2010), but rarely has this line of research been systematically integrated with institutional theory (see Sauder, 2008 for an exception). All this is to say that the theoretical and empirical tools to study social influence at various levels are out there and waiting to be put to good use by institutionalists.

Importantly, social influence processes may be quite efficient in transmitting information, but in doing so, they can lead actors astray. In models of cascades, behavioral signals have equal transition probabilities as new people join the cascade, and often predict well how others will behave. However, if the initial signal is weak or incorrect, the result may be an error cascade where everyone makes the wrong choice. This might be buying a stock that is overpriced (Levine et al., 2014), or choosing a popular but bad restaurant (Banerjee, 1992).

Routines

Routines – and related concepts such as habits, conventions, customs, interaction rituals, and standard practices – can be generally understood as learned, highly patterned, repetitive behavioral patterns for interdependent actions (P. L. Berger & Luckmann, 1966; Bourdieu, 1990; DiMaggio, 1997; Garfinkel, 1967; Nelson & Winter, 1982). They are often (but not always) tacit, and they can help organize behavior in a predictable fashion (Biggart & Beamish, 2003). In a way, routines represent the behavioral dimension of institutionalization.[2] Whereas earlier elaborations of institutional theory consequently saw a central role for studying routines (Meyer & Scott, 1992; Zucker, 1987), institutional researchers appear to have lost sight of this important topic for the longest time (Smets, Aristidou, & Whittington, 2017). We agree with Biggart and Beamish (2003, p. 458) that we need to redress this trend, as "(e)xamining the construction and use of conventions can complement institutional (…) theories by supplementing under-socialized conceptions" of institutions. A deeper understanding of routines – one that is based on social psychological knowledge of why people are motivated to enact

them and how they can have both functional and dysfunctional consequences – has significant value for institutional theorizing.

A key insight from the literature on routines is that they help to organize situations into expected relationships and to identify appropriate responses (DiMaggio, 1997; Garfinkel, 1967; Weick, 1979; Zerubavel, 1997). It is especially in uncertain and complex situations that actors seek routines based on their experience in determining what has worked in the past, what others are likely to do, and how they themselves should behave (Biggart & Beamish, 2003). This implies an important scope condition of habituation: it can be expected that actors may deviate from routines and exercise more agency when situations are relatively certain and well-structured (P. L. Berger & Luckmann, 1966; Schilke, 2018). Conversely, psychological research on habits suggests that a situation must have clearly decipherable context cues for routine performance to be triggered (Wood & Rünger, 2016); if cues are too ambiguous, the mental representation of the routine may fail to activate (Schilke, 2014). These insights offer interesting competing positions regarding the role of uncertainty and complexity in institutionalization that require future research to resolve. Further, psychological research informs us that actors resort to routines especially when they lack (a) the ability and (b) the motivation to engage in executive deliberation (Wood, Labrecque, Lin, & Rünger, 2014), leading to the question of whether actors' resistance to institutionalization can be trained and/or incentivized.

In closing our discussion of the social psychological foundations of micro-institutional inquiry, it is important to note that building on findings from social psychology comes with both opportunities and challenges. For example, social psychological studies may be based on divergent assumptions, they may not be designed to directly speak to organizational settings, and their empirical paradigms may require adaptation to be applicable to institutional inquiry. Nonetheless, we believe that these challenges are all but insurmountable and that they are outweighed by the opportunities. Indeed, the fact that existing insights may not be transferred directly and unreflectedly offers an important opportunity for micro-institutional scholars to both extend the range of applications of extant social psychological research and also break new theoretical ground.

CONTEMPORARY MICRO-INSTITUTIONAL RESEARCH STREAMS

At least since the publication of the first edition of the "green book" (Greenwood et al., 2008), we have witnessed an unprecedented resurgence of interest in the micro-institutional approach. Over the years, different groups of scholars have come to suggest different windows into investigating how institutions work "on the ground" and how they shape and are shaped by people. In doing so, they have sometimes used diverse approaches and employed different terminology, leading to a considerable degree of fragmentation in the field. For instance, some scholars have adopted a focus on institutional entrepreneurship/work (Battilana, 2006; Maguire, Hardy, & Lawrence, 2004) or on the reinvigoration

of old institutionalism (Hirsch & Lounsbury, 1997), while again others have been dedicated to inhabited institutionalism (Hallett, 2010; Hallett & Ventresca, 2006) or to (micro-level) institutional logics (Thornton, Ocasio, & Lounsbury, 2012). Important differences notwithstanding, we see these approaches as highly complementary in their emphasis on individual- and group-level action and their attention to institutional phenomena within organizations. Therefore, our hope is that scholarship of these different strands will come together to develop a more integrated, more powerful framework of micro-institutional processes.

For instance, much of the literature on institutional entrepreneurship is motivated by developing a better understanding of heterogeneity and institutional change (Battilana, 2006; Maguire et al., 2004) – precisely the two issues that are also at the heart of Hirsch and Lounsbury's (1997) call to return to Selznick's line of old-institutional inquiry and of inhabited institutionalism's quest to elucidate how people may deviate from institutional scripts (Hallett, 2010; Hallett & Ventresca, 2006). Certainly, some of these streams have focused on different mechanisms explaining differentiation – ranging from social positions (Battilana, 2006) over sense making (Hallett, 2010) and attention, identity, and social interaction (Thornton et al., 2012) to norms and values (Hirsch & Lounsbury, 1997). Nonetheless, given significant similarities in approach and objective, we advocate reconciliation between these theoretical currents that would provide a more comprehensive approach to the differentiation-isomorphism question. Indeed, we think it is vital these different approaches set aside terminological differences and link up in order for micro-institutional inquiry to reach its full potential. And we are optimistic that such integration will occur, as recent investigations have found creative ways to combine arguments from these different approaches to develop a strong foundation and motivation for micro-institutional inquiry (e.g., Berman, 2012; Schilke, 2018; Voronov & Yorks, 2015).

FUTURE DIRECTIONS FOR MICRO-INSTITUTIONAL INQUIRY

What is sometimes misunderstood by those using micro-level concepts is that they are necessarily woven into the other levels, not abandoned as we go higher in the structure. For instance, individual actors underlie the development of work routines, hiring and firing, and so on in organizations; individual actors don't just reproduce structure in organizations or in government, but actively modify and re-invent it (Burt, 2005; Coleman, 1986, 1990). This oftentimes creates contested terrain, driving change in otherwise highly institutionalized structures. A picture of constant change through contestation is much closer to the truth than the static picture of isomorphism, as often only the external trappings match – with much of the internal action driven by "invented-on-the-spot" change (though in some cases this change is designed to patch-up the institutionalized process to endure another day).

Moving forward, our goal should be to explain institutionalization (and de-institutionalization) by examining specific processes, and to avoid imprecise

concepts such as diffusion that encompass a wide range of quite different underlying mechanisms causing practices to remain stable or new practices to be adopted. We see four main clusters of issues as posing particularly interesting opportunities for exploring micro-institutional processes, two of which we have touched on in the section on theoretical approach above, and will only briefly recapitulate.

First, "legitimacy stretching" is a central process of institutional change, as recently demonstrated by Reilly's (2018) ethnography of stand-up comedy. Status differences sometimes underlie "legitimacy expansion," with higher status demonstrably allowing in some cases deviance without censure (Reilly, 2018, pp. 941–942). In the world of stand-up comics, there are a large number of jokes that could be viewed as cases of theft, but these are reduced to a much smaller number of joke theft accusations aimed mainly at lower status comics who may also be seen as inauthentic. There is a lot of variance at both levels, and overall the sense of justice may decline; there is evidence of selective and inconsistent framing of norm violations. But legitimate actions may also migrate to other kinds of actors, in fact traveling up to meso- or macro-domains, seen as new rights of action that only corporations (or only governments) might invoke. In some cases most see that these newly legitimated actions may be beneficial to both the corporation and the individuals in it (Burt, 2005; Coleman, 1986, 1990); as well as both the government and persons, especially children, in it (Boli-Bennett & Meyer, 1978). These changes provide examples of how action might be transformed into meso- or macro-institutional, and may either benefit or take-away actions from persons. Taken jointly, rights may either be stable or may decline overall; as when children after a certain age can no longer routinely be taught at home and their instruction is transferred from parents to the state. Educational systems are often thought not successful, and harm sometimes comes to children in schools from bullying and other deviant behavior that is not sufficiently controlled. Parents in these cases may have limited authorization to take action. In some cases, then, transferal of action opportunities and rights may reduce parental interference, and the net effect may decrease what individual persons are allowed to do, causing "legitimacy shrinkage."

Second, as reviewed under relevant social psychological research above, routines are learned, highly patterned and repetitious. They are also often deeply embedded in organizations (Granovetter, 1985), and are highly institutionalized as the structure around which consistent, stable patterns of (work) behavior are organized. We again draw parallels to constructing jigsaw puzzles here: as routines proliferate across an organization, one routine fits into the next, ordering work sequentially or in some other patterned way. As these patterned routines mesh and become interdependent – so more highly institutionalized – they are even more puzzle-like through their interconnection (see Fig. 1). However, they may become fragile and may be rapidly redefined when a central piece is modified due to technological, competitive, or other factors – and in the puzzle analogy, they fall apart and pieces scatter. Beyond work routines, classifications are even more embedded in each other (Bowker & Star, 2000; Durkheim & Mauss, 1967 [1903]) and may be hierarchical as well, so that a small change not only affects adjacent puzzle pieces, but the stability and integrity of the whole puzzle. In that

way, these "pieces" may quickly become unstable and "unembedded," ending their institutionalized properties. In some cases, we can think of these changes as a cascade (Bikhchandani et al., 1992), as we did above in our general theory, and we extend these ideas below.

Third, social influence research is another example of where micro-institutional approaches borrow from established social psychological lines of research. Again, press toward institutionalized action is aided by the repeated finding that people are more likely to adopt a particular practice if others have done so. Here, we will again use a cascades framework to talk about "error cascades" (Bikhchandani, Hirshleifer, & Welch, 1998). The probability of error cascades is high, that is blindly following someone else's observed action. How is it that institutions persist, if they are often "wrong"? Research on rumor and gossip transmission can provide relevant insight (Shibutani, 1966). Rumors quickly get distorted if the group is large, but any mechanisms that re-transmits the rumor along the old trail it followed will eventually restore the rumor to close to its original form. So, once again, the specific processes that are involved can shift an outcome from institutional to random, or from random to institutional. Cascades can also end abruptly, and – just as routines and classifications experience – become suddenly redefined.

A breakthrough invention or series of inventions that create a new field of research are often the way that a cascade – or a classification or routine – will end. In that case, there is little to find in the way of continuity and the institutional aspects of the prior area simply fade away. Categories shift, often dramatically, and new processes operate. There is not a good puzzle analogy for breakthroughs that form a new industry, as the pieces all change (Zucker & Darby, 2014; Zucker, Darby, & Brewer, 1998), but see our discussion above for thinking about pattern shifts over time. Tacit knowledge is typically very high in the new field, but this does vary.

Fourth and finally, we believe that a theoretical reorientation toward micro-processes should go hand in hand with a methodological reorientation, and we see experiments – in the lab or in the field – as ideally positioned to advance the micro-institutional research agenda, given their unique ability to establish causality and to isolate theoretical mechanisms. This point has been made before (e.g., Bitektine, Lucas, & Schilke, 2018; Deephouse, Bundy, Tost, & Suchman, 2017; Kennedy & Fiss, 2009; Schilke, Levine, Kacperczyk, & Zucker, 2019), and several scholars have already responded to the call for more experimental research in institutional theory (e.g., Glaser, Fast, Harmon, & Green, 2016; Raaijmakers, Vermeulen, Meeus, & Zietsma, 2015; Schilke, 2018; Schilke & Rossman, 2018). Nonetheless, the overall number of experimental studies in institutional research – compared to those using, for example, qualitative or archival methods – is relatively low (see Di Stefano & Gutierrez, forthcoming for a similar assessment for the field of strategy research), resulting in a significant research gap. We hope that this chapter, by elaborating some of the key social psychological mechanisms in institutional theory, will help to change this.

Specifically, legitimacy can be modeled experimentally both as an independent and dependent variable (Haack et al., 2016). Similarly, experiments can be

highly useful to disentangle the reciprocal effects of trust and institutionalization (Lumineau & Schilke, 2018) and to elucidate the role of different types and conditions of social influence in objectification and exteriority (Zucker, 1977). Experiments can also be fruitfully used to study routines and the conditions affecting their stability over time (Cohen & Bacdayan, 1994).

In addition, we encourage experimental institutional scholars to go back to some of the fundamental research questions posed by Meyer and Rowan (1977, pp. 360–361):

> (e)xperimentally, one could study the impact on the decisions of organizational managers, in planning or altering organizational structures, of hypothetical variations in environmental institutionalization. Do managers plan differently if they are informed about the existence of established occupations or programmatic institutions in their environments? (…) Do managers, presented with the description of an elaborately institutionalized environment, propose to spend more energy maintaining ritual isomorphism and less on monitoring internal conformity? Do they tend to become in-attentive to evaluation?

These questions about the impact of institutionalized environments on managers and the decisions they make clearly require greater attention and should provide an important basis for future experimental inquiry.

CONCLUSION

Our goal has been to identify micro-institutional roots in foundational institutional scholarship, relevant research in other areas, and also suggest new directions for micro-institutional theorizing and research. We hope our chapter has provided enough of an outline to entice you to become a member of the micro-institutional community, and we hope there will be more focus on concrete concepts and mechanisms going forward. We hope also that experiments in this area will become more routine (institutionalized!), although we realize many of our readers will have little training in these methods. Remember that after the first few years out of graduate school or postdoctoral fellowships we are all on our own for retraining, and continuing to learn is the name of the game. It is a positive event nearly every time to ask for support from your colleagues and trade knowledge with them.

We end for now, and hope we have imparted some of the excitement that sustains us through the long hours of puzzling our way through a new idea or new subarea of research. We hope our excitement and fascination with identifying and exploring micro-institutions and microfoundations has infected you with a desire to work in this area. We welcome you!

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NOTES

1. For example, if biotechnology, using new research and production tools and new organizational forms, can provide new medicines with significant benefits that outcompete the old, then old pharmaceutical structures either fade away primarily through being acquired and turning from drug discovery to producing generics, or decide to join the revolution (Zucker & Darby, 2005; Zucker, Darby, & Brewer, 1998). This is not simply a competitive change, as the institutional bases of organizational design and chemical production shift from top-down hierarchies to more level structures and biological production. A niche where the only blood-related products were biological in the late twentieth century became populated with a rapidly expanding set of organizations that invented biological tools as it redefined the biological category in pharmaceutical products.

2. Of course, it is virtually impossible to fully separate cognition and behaviors, as they tend to be highly intertwined, such that behavioral scripts shape cognition, and vice versa.

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