A DRAMATURGICAL MODEL OF THE PRODUCTION OF PERFORMANCE DATA

João Vieira da Cunha
European University, Estrada da Correira 1500-210 Lisbon, PORTUGAL, and
Department of Business Administration, Aarhus University, Nordre Ringgade 1,
DK-8000 Aarhus C, DENMARK  {joao.cunha@europeia.pt}

The production of performance data in organizations is often described as a functional process that managers enforce on their employees to provide leaders with accurate information about employees’ work and their achievements. This study draws on a 15-month ethnography of a desk sales unit to build a dramaturgical model that explains how managers participate in the production of performance data to impress rather than inform leaders. Research on management information systems is reviewed to outline a protective specification of this model where managers participate in the production of performance data to suppress information that threatens the image they present to leaders. Ethnographic data about the production and use of performance records and performance reports in a desk sales unit is examined to induce an exploitive specification of this dramaturgical model. This specification explains how people can take advantage of the opportunities, rather than just avoid the threats that performance data presents for impression management. It also demonstrates how managers can participate in the production of performance data to create an idealized version of their accomplishments and that leaders reify these data by using them in their own attempts at impressing others. By doing so, leaders and managers turn information systems into store windows to show achievement upward instead of transparent windows to monitor compliance downward.

Keywords: Management information systems, production of performance data, performance monitoring, implementation of information technology, ethnography

Introduction

Toward what end do managers and their leaders use information systems? Research shows that leaders use information systems as a window into market dynamics and strategy implementation (Clark et al. 2007; Mahmood and Soon 2007). It suggests a functional model of the production of performance data in which managers use information systems to provide their leaders with detailed records of employees’ work (Miller 2001; Smith et al. 1991).

However, leaders also use information systems as a window into managers’ achievements. Boland (1993, p. 135) showed that leaders are

readers [who] make the accounting reports their own by breathing life back into the managers who are being reported upon in the sterile categories. They bring the managers to life as intentional, willful beings, and place them in a rich social context of peers, superiors and subordinates.

Leaders read accounting reports and other performance data not only for clues about company performance but also for hints about the potential of managers for formal positions of power and informal positions of influence (see Kanter 1993;
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Thus doing, leaders transform reporting cycles into “probationary crucibles” in which managers must continually please their boss, their boss’s boss, their patrons, their president and their CEO, [and] they must prove themselves again and again to each other…this constant state of probation produces a profound anxiety in managers, [which is] perhaps the key experience of managerial work (Jackall 1989, p. 40).

This suggests a dramaturgical model of the production of performance data that explains how managers use information systems to cope with the effects of performance data on their attempts to impress their leaders.

In the research reported below, I outline this dramaturgical model. I use research on information systems to induce a protective specification of this model that explains how managers hide data that endangers the image that they want to present. I use a 15-month ethnography of a sales unit to put forth an exploitive specification that explains how managers take advantage of information systems to impress their leaders rather than simply coping with the threat of unflattering performance data. This specification improves the effectiveness of performance data for presenting an idealized image of managers’ achievements and reduces their effectiveness for presenting an accurate image of organizational processes. This specification transforms management information systems from a threatening transparent window to a profitable store window.

**Toward a Dramaturgical Model of the Production of Performance Data**

Goffman’s (1959, pp. 2-7, 238) dramaturgical theory of interaction can be adapted to specify a model of how managers incorporate performance data into their attempts to impress their leaders. The building block of Goffman’s theory is the encounter, an interaction in which others form impressions of people based on the information people convey and the information that others obtain from independent sources, such as performance data. For Goffman, the information a person conveys through expressions given and expressions given off is the chief source of the image that others have of them:

> The first involves verbal symbols or their substitutes which he uses admittedly and solely to convey information that he and the others are known to attach to these symbols. This is communication in the traditional and narrow sense. The second involves a wide range of action that others can treat as symptomatic of the actor, the expectation being that the action was performed for reasons other than the information conveyed in this way (p. 2).

Information from independent sources is a threat to the image that a person attempts to convey because it provides “facts which, if attention is drawn to them during …[an interaction], would discredit, disrupt, or make useless the impression that … [the person] fosters” (Goffman 1959, p. 141).

Goffman’s (1959, pp. 4, 15) dramaturgical theory of interaction expands on his model of encounters by explaining how people use the expressions they give off to shape the impressions others have of them. The dramaturgical model of performance data that I develop herein expands on Goffman’s model by explaining how managers participate in the production of information to shape the impressions their leaders have of them (I thank an anonymous reviewer for helping me make this distinction). The model explores the techniques that managers use to omit or improve this information to complement Goffman’s discussion of the techniques that people use to cope with its consequences for the image that they want to present. It improves on theories that explain the effects of technology in the authority relationship but that do not account for impression management (Barker and Cheney 1994; see also Markus 1983). It also improves on theories of impression management that explain how leaders form impressions about their managers but do not account for their use of information such as performance data to do so (e.g. Kanter 1993). Figure 1 applies Goffman’s model of encounters to managers’ attempts to impress their leaders, specifying the role of performance data therein.

Goffman emphasizes the dramaturgical potential of expressions because he focuses on encounters where people can present an image better than their achievements because audiences do not have access to information that disproves people’s claims. In these interactions, “many crucial facts lie beyond the time and place of interaction or lie concealed within it” (Goffman 1959, p. 1). Therefore, others are likely to find that they must accept the individual on faith, offering him a just return while he is present before them in exchange for something whose true value will not be established until after he has left their presence (Goffman 1959, p. 2).

I emphasize the dramaturgical potential of information because managers attempt to impress their leaders in more demanding circumstances than those outlined by Goffman.
Managers must cope with information systems that produce and broadcast a stream of evidence about their actions and achievements (e.g., Ezzamel and Willmott 1998; Lapointe and Rivard 2005). This suggests that Goffman’s model of encounters is a fertile ground to grow a dramaturgical model of the production of performance data, but it needs to be adapted, rather than simply adopted, to explain how information systems can be used for impression management in such difficult circumstances.

Performance Data as a Threat for Impression Management

Independent information such as performance data is more of a threat to managers’ attempts to impress their leaders in interactions than Goffman’s model of encounters would suggest (see Boland 1993; Elmes et al. 2005; Saunders 1981). Management information systems provide leaders with continuous access to real-time data about their managers’ actions and achievements, whereas power dynamics in organizations allow managers only occasional face-to-face contact with their leaders (see Clark et al. 2007; Jackall 1989).

Information systems prevent managers from presenting an idealized image of their achievements because they are an independent check on managers’ contributions to their company. They show managers thriving and triumphing, but also failing and floundering while enforcing prescribed targets (Orlikowski 1996; Zuboff 1988). Information systems also prevent managers from presenting an idealized image of their practices because they expose the backstage of employees’ work. They may support the image that managers present in interactions by providing an independent record of managers’ attempts to enforce compliance with prescribed procedures. However, information systems may also discredit that image by revealing managers’ leniency toward the improvisations that employees may use to achieve prescribed targets (McBride 1997; Sewell 1998).

The prevalence of performance data over interactions limits managers’ opportunities to give and give off expressions that frame any unflattering performance data in a better light, or at least attenuate their effect on the image managers present to their leaders (Martinsons et al. 1999; Sia et al. 2002). Instead, managers must cope with the wide variety of impressions that leaders may form about them when leaders interpret performance data on their own by [making] sense of accounting texts by drawing upon a rich and diverse set of interpretive schemes, norms and facilities. Sometimes, no doubt, they coincide with those that we might typically associate with management accounting systems. But, ... [leaders] are more potent, active and creative in making meaning with texts than our accounting typifications suggest (Boland 1993, p. 140).

Specified thus, leaders’ interpretations of performance data not only prevent managers from influencing but also from anticipating the impressions that their leaders form of them. It makes managers’ efforts to address the threats that performance data create for the image they present to their leaders as important as their attempts to impress their leaders in interactions. It suggests that an explanation of the tactics that managers use to shape the image that their leaders have of them requires an extension of Goffman’s model that allows for a dominant effect of independent information on the impressions that others form of people’s intentions and accomplishments.

The Structuration of Tactics to Avoid the Threats of Performance Data

Research on information technology adoption suggests that managers’ participation in the production of performance data to inform or impress their leaders is contingent on their company’s culture, structure, and resources (see Orlikowski and
Robey 1991). It shows that the norms and meanings, and the structures and procedures, that have the most power over managers’ participation in the production of performance data change from one organization to the next—for example, compare Kanter (1993) with Watson (2001), and Orlikowski (1996) with Gwillim et al. (2005). However, these studies specify the meanings, norms, rules and procedures around information systems as the starting point for exploring the roles of culture and structure in a dramaturgical model of the production of performance data (see Broadbent et al. 1999; Leidner and Kayworth 2006).

Information systems stand out among the resources that constitute leaders’ use of performance data to assess their managers and among those that constitute managers’ attempts to produce performance data that impress their leaders (e.g., Covaleski et al. 1998). Information systems structure this dramaturgical exchange by specifying the visibility that leaders have over managers and employees. They define the extent to which managers can improve the image that they present to their leaders beyond their actions and accomplishments (see Jackall 1989).

Research on the adoption of IT points to two configurations of meanings, rules, and resources that shape how managers participate in the production of performance data to impress their leaders. The first establishes a strong link between work and performance data. It is based on IT such as those used for managing call centers (e.g., Ball and Wilson 2000), that automatically generates information about the underlying … processes through which an organization accomplishes its work … [and] provides a deeper level of transparency to activities that … [would otherwise be] either partially or completely opaque (Zuboff 1988, p. 9).

When information systems are incorporated into work in this way, employees cannot work without leaving electronic traces of their action which constitute evidence of the abilities and achievements of their managers. This strong link between work and its representation is reinforced when leaders rely on their company’s information systems, rather than on their interactions with managers, to provide the performance data they use to form interpretations of their company’s performance and to form impressions of their managers’ potential (see Boland 1993).

The second configuration establishes a weak link between work and its representation. It is based on information systems, such as those used for supervising salespeople, that require employees to report their work themselves and also require managers to enforce the representation of work in addition to enforcing procedures and goals (Gefen and Ridings 2002; Pullig et al. 2002). When information systems are implemented thus, they allow managers to decide on the performance data available to their leaders without exposing their resistance to prescribed uses of IT (see Orlikowski 1996). This weak link between work and its representation is enfeebled when leaders rely on their managers to select, translate, and summarize the performance data they use to monitor their company and to assess their managers (Langley 1990; Vaara and Mantere 2008).

Each of these two configurations supports different tactics that managers can use to incorporate performance data into their attempts to impress their leaders. The first suggests tactics that hinder the production of performance data. The second suggests tactics that take advantage of it. The contrast between them highlights that a dramaturgical model of the production of performance data requires an extension to Goffman’s model that incorporates the effect of information systems and of the meanings and norms around them on the tactics that managers use to impress their leaders.

Addressing the Challenges of Performance Data for Impression Management

Research on IT adoption explains how managers can avoid the threats that a strong link between work and its representation creates for the image they present to their leaders (e.g., Doolin 2004; Lapointe and Rivard 2005; Marakas and Hornik 1996). First, managers can avoid destructive performance data by using employees’ reactions to the exposure that information systems impose on work. When managers implement technology that improves surveillance, the behavioral expectations of … [managers] can be so keenly anticipated by … [employees] that the foreknowledge of visibility is enough to induce conformity to … normative standards (Zuboff 1988, p. 345).

Information systems support managers’ attempts to impress their leaders in interactions because these technologies enforce, present, and broadcast employee compliance on their own (Elmes et al. 2005). However, employees may lag behind targets because they lack the ability rather than the motivation to achieve them, turning performance data into an advertisement of managers’ ineptitude for leadership (Beaudry and Pinsonneault 2005).
Second, managers can avoid destructive performance data by selecting the information available to their leaders, turning technology into a medium that “expressed the activities they had performed backstage in terms that were compatible with the norms of front stage behavior” (Orlikowski 1996, p. 77). This tactic benefits from the power that managers have over their employees’ use of information systems to avoid unflattering performance data. However, it can reduce managers’ visibility of employees’ work and make them hostages to employees’ ability to report compliance with prescribed procedures and targets (see Beaudry and Pinsonneault 2005; Heath and Luff 2000).

Third, managers can avoid destructive performance data by restricting their leaders’ access to data on employees’ work, crafting “sly, subversive and … imaginative adaptations … [to] thwart … [their leaders’] efforts at omniscience” (Zuboff 1988, p. 352). Managers reduce the threat of performance data for their attempts at impressing their leaders by “[controlling] what they look at, and … [limiting their opportunities to] just come in and snoop” (Zuboff 1988, p. 344). However, this tactic exposes managers’ reluctance to enforce prescribed information systems and may hinder the image they want to present just as much as data on their failure to enforce procedures and goals might (Ginzberg 1981; Gwillim et al. 2005).

The first tactic shows that managers can surrender to the threats that performance data create to the image that they present to their leaders. The second and third tactics show that managers can avoid these threats by hindering the production of unflattering performance data. These two tactics suggest a third extension to Goffman’s model that establishes a connection which allows people to affect sources of information about their achievements other than the expressions they give and give off. Figure 2 illustrates this third extension and the previous two extensions to Goffman’s model of encounters necessary to use it as a basis for this dramaturgical model of the production of performance data. The wide arrow in Figure 2 linking performance data to leaders’ impressions marks the predominance of these data over expressions. The figure represents the structuration of managers’ attempts to impress their leaders by linking meanings and rules to expressions, performance data, and impressions. It draws two links that represent the power that managers have to produce performance data about themselves directly by using IT, and indirectly by enforcing procedures upon employees.

The tactics that managers can use to avoid the threats that a strong link between work and its representation impose on their attempts at impressing their leaders provide only a protective specification of a dramaturgical model of the production of performance data, represented in Figure 3. These tactics enable managers to safeguard the image that they present to their leaders in interaction by using IT to withhold evidence that would jeopardize it. However, the difficulties each of these tactics raise suggest that they only displace or delay the threats of performance data for impression management.

Goffman’s model of encounters suggests that this protective specification only transposes to the production of performance data the weaker of the two processes for impressing others in interactions—that of withholding sayings and doings that jeopardize the person’s image. This process only avoids the impressions that people do not want others to have about them; it does not help people to project the image that they actually want to convey to others. It suggests that taking advantage of the dramaturgical potential of performance data requires managers to transpose to the production of performance data the other, stronger process for impressing others—that of giving and giving off expressions that improve the image that people present to others beyond their actions and achievements.

Research on IT adoption indicates that this second process is easier to transpose to the production of performance data when the link between work and its representation is weak (see Gwillim et al. 2005; Markus 1983; Orlikowski 1996). In these conditions, recording and reporting employees’ practices and their achievements in information systems is a labor-intensive process that enables managers to use their power over the production of performance data to impress their leaders. If the process of giving and giving off expressions is indeed transposable to managers’ roles in the production of performance data, protective tactics underspecify the impression management potential of performance data because managers can improve the image that performance data give of their accomplishments far beyond what their employees have achieved. If managers can shape performance data in this way, protective tactics also understate the effect of managers’ attempts to use performance data for impressing their leaders on the information leaders use to decide on a strategy and monitor its implementation.

I develop a specification of the dramaturgical model of the production of performance data that transposes people’s attempts to improve their image in interactions to the production of performance data by drawing on an ethnography of a desk sales unit to answer the following research question: How do managers participate in the production of performance data to impress their leaders when the link between work and its representation is weak?

I show that in such conditions managers can produce (and enforce the production of) performance data that gives and gives off idealized representations of their accomplishments.
They turn information systems into a store window to show success upward rather than using it as a transparent window to monitor and expose compliance downward.

**Methods**

This study reports on a 15-month ethnography at DeskSales, from June 2002 until September 2003. DeskSales is a desk sales unit in the European operations of Mega Telecom (or M-Tel), a company created by the merger between a U.S. and a European company in the telecommunications industry (names, dates, and other identifying information were changed to protect anonymity of participants).

**Research Setting**

M-Tel created DeskSales to take the sale of cheaper products away from its field salesforce. These sales did not justify the cost of a field salesperson (about $250 per customer contact) but they justified that of a desk salesperson (about $25 per customer contact). DeskSales had 8 teams of 10 salespeople, each of which was led by a sales manager who appointed a
Table 1. Contents of Monthly Team Reports and Monthly Unit Reports

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<tr>
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<th>Monthly team reports</th>
<th>Monthly unit reports</th>
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<tbody>
<tr>
<td>Individual-level data</td>
<td>• Customer, product, contract value and new revenue for each open opportunity</td>
<td>• Three closed opportunities with largest new revenue</td>
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<tr>
<td></td>
<td>• Customer, product, contract value and new revenue for each opportunity closed as a sale</td>
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<td></td>
<td>• Customer, product, contract value and new revenue for each opportunity cancelled because customer decided to buy from competitor</td>
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<tr>
<td>Team level data</td>
<td>• Number of open, sold and cancelled opportunities per team in the current month</td>
<td>• Monthly new revenue target and monthly new revenue from closed opportunities per team</td>
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<td></td>
<td>• Contract value of open, sold and cancelled opportunities per team in the current month</td>
<td>• Yearly new revenue target and accumulated revenue from closed opportunities per team</td>
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<td></td>
<td>• New revenue of open, sold and cancelled opportunities per team in the current month</td>
<td>• Monthly new revenue in open opportunities per team</td>
</tr>
<tr>
<td>Unit level data</td>
<td>• Total number of open, sold and cancelled opportunities</td>
<td>• Monthly conversion rate (% of open opportunities which are closed as sales) for each team</td>
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<tr>
<td></td>
<td>• Total contract value of open, sold and cancelled opportunities</td>
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<td></td>
<td>• Total new revenue of open, sold and cancelled opportunities</td>
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salesperson as a deputy to help with preparing reports. Sales managers answered to Mariah, the unit’s general manager, who in turn reported to a steering committee that assessed and reported the unit’s value for M-Tel’s salesforce.

DeskSales had a three-stage reporting system. First, salespeople recorded their sales in Siebel, one of the leading customer relationship management systems. M-Tel implemented Siebel to support salespeople’s selling and to help managers assess sales performance. Second, sales managers compiled their team’s Siebel records into a spreadsheet, called the monthly team report, which they then sent to their general manager every month. Third, DeskSales’s general manager prepared a monthly presentation for the steering committee, called the monthly unit report, which compiled the performance reports that she received from sales managers. Table 1 lists the data in each of these reports.

The production of performance data at DeskSales was a labor-intensive process. Salespeople needed to allocate part of their workday to recording leads, opportunities, and closed sales in Siebel. Sales managers and their deputies needed to monitor and enforce the production of these data and prepare monthly reports that summarized their team’s performance. The general manager had to compile and interpret these reports into a presentation of the overall performance of the unit.

Each of these stages provided an opportunity for managers at DeskSales to improve the image sales reports gave of their accomplishments. Table 2 shows that the new revenue salespeople reported in Siebel increased when it was compiled into monthly team reports and increased again when these were integrated into the monthly unit reports. It also shows that when salespeople failed their monthly targets, sales managers and the unit’s general manager altered their reports to portray themselves as able and willing to comply with their prescribed targets. When salespeople reached their targets, sales managers and the unit’s general manager also increased reported sales to improve their own image beyond their employees’ accomplishments. The empirical challenge of this research is to explain how they did so.

Data Collection

I carried out full-time participant observation at DeskSales during the first five quarters of the unit’s existence (Table 3 lists the data collection procedures). Access was granted under an agreement between M-Tel and a large U.S. university that gave M-Tel access to seminars and publications in return for research opportunities. I was neither required nor asked to report my observations and findings to managers at DeskSales and M-Tel.
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My goal was to study the implementation of an information system and its consequences for managers’ work. My first three months at DeskSales allowed me to observe the introduction of Siebel at DeskSales. I stayed an additional 12 months to see the ebb and flow of reporting throughout a full financial year (which ended in April).

Data Analysis

Table 4 outlines my analytical procedures by drawing on the categories from the version of Goffman’s (1959) model of encounters which I adapted to include the role of performance data in managers’ attempts to impress their leaders. This description trades accuracy for clarity by presenting a simplified, linear version of the process I used to move back and forth between theoretical frameworks and empirical evidence by “juggling of induction, i.e., interpreting the data using situated and subjective knowledge, and deduction, i.e., applying objectified methods, frameworks, and theories to the data” (Schultze 2000, p. 25). This description provides the information necessary to understand and examine my data analytical procedures while refraining from indulging in a description of the many improvisations implicated in building
Table 3. Data Collection Procedures

<table>
<thead>
<tr>
<th>Observations</th>
<th>Interviews</th>
<th>Documents</th>
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<tbody>
<tr>
<td><strong>Daily observation of salespeople</strong> which took place every weekday, except</td>
<td>Interviewed all desk salespeople, all desk sales managers, the unit’s</td>
<td>All of the email messages and all of the documents and notes that each</td>
</tr>
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<td>national holidays, between the beginning of June 2002 and the end of</td>
<td>general manager, and all the members’ of M-Tel’s steering committee.</td>
<td>salesperson I observed received, sent and created throughout the day.</td>
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<td>September 2003 at DeskSales, from 8 a.m. until 7 p.m. (regular work hours</td>
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<td>were from 9 a.m. to 5:30 p.m.). Observation consisted of sitting next to, and</td>
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<td>observing each desk salesperson on the unit. I spent at least one day with</td>
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<td>every single desk salesperson.</td>
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<td><strong>Monthly observation of deputy sales managers</strong> while they prepared their</td>
<td>The interview guide included questions about people’s interpretation of</td>
<td>All the reports produced by DeskSales’ steering committee, all of the</td>
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<td>team’s monthly unit report. I observed all of the steps that they took to</td>
<td>their work, their interpretation of Siebel, their interpretation of</td>
<td>unit’s monthly reports and all of desk sales team’s monthly reports.</td>
</tr>
<tr>
<td>prepare the document and recorded all the instructions that they received</td>
<td>leaders’ use of performance data, their views on the culture and structure</td>
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<tr>
<td>from their desk sales manager while doing so.</td>
<td>of the unit and of their own team and questions about the leadership styles</td>
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<tr>
<td>**Monthly observation of deputy sales managers and desk sales managers</td>
<td>of desk sales managers, the unit’s general manager and the members of the</td>
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<tr>
<td>collating data from the unit’s monthly report and I observed Mariah and her</td>
<td>members of the steering committee.</td>
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<tr>
<td>deputy sales managers transform that data into a final monthly report for</td>
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<tr>
<td>DeskSales’ steering committee.</td>
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<tr>
<td>**Weekly observation of 51 weekly sales team meetings of the 486 which</td>
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<td>occurred during the first 15 months of the unit (I only observed about one</td>
<td><strong>Quarterly observation of the meetings of DeskSales’ steering committee</strong></td>
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<td>in ten meetings, as many teams held their meetings simultaneously).</td>
<td>which occurred every three months.</td>
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<tr>
<td><strong>Quarterly observation of the meetings of DeskSales’ steering committee</strong></td>
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<tr>
<td>which occurred every three months.</td>
<td>307 days of observation</td>
<td>120 interviews</td>
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<td></td>
<td>15 monthly unit reports</td>
<td>120 monthly team reports</td>
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<td>120 monthly team reports</td>
<td>120 monthly team reports</td>
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<td></td>
<td>Around 3500 pages of documents</td>
<td>Around 3500 pages of documents</td>
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a dramaturgical model of the production of performance data from a 15-month ethnography (for example, compare Barley 1986 with Barley 1990 and Schultze 2000 with Schultze and Boland 2000).

The Production of Performance Data by Sales Managers

Sales managers at DeskSales associated their participation in the production of performance data to their own individual interests.

Relationship between Sales Managers' Interests and Image

Sales managers described their individual interests using two different career goals. Five managers had career aspirations beyond DeskSales. For Nathan, DeskSales was a “stepping stone” to becoming a sales manager in M-Tel’s field salesforce:

When you’re an account director [that is, when you manage a field account team], … you’re responsible for a large amount of revenue for [M-Tel]. You [are also responsible for] the welfare of all the people that work for you, … so you have that quite enjoyable management task of making sure that you are growing people. That way you’re not just sort of using them, like we do here [at DeskSales] but also realizing their potential within the business.

The other three sales managers wanted to stay at DeskSales. Robert confessed:

I’m not entirely sales focused. You do get a lot of people constantly driving sales, … drumming the business initiatives into you, … I like to have a nice team and stick with my guys. I think that a lot of people in the management team can get too en-grossed in politics and forget that the people that work for us are good people and there is actually something there better than politics and fast-rising careers.
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Managers’ interests were elicited from their answers to three questions: “how do you feel about your job,” “how would you describe yourself,” and “what sort of career would you like to have.” I coded these answers for managers’ descriptions of their desired future (see Bandura 2001).

I divided managers into two groups.

One group consisted of managers that wanted to advance their career. Their descriptions of their desired future included a job in M-Tel’s field sales force or a job in M-Tel’s corporate units such as marketing and sales planning. They justified their ambitions with the odds of bigger salaries, the chance of demanding challenges, and the prospects of increased power.

The other group consisted of managers who wanted to stabilize their career. Their descriptions of their desired future as included their current job at DeskSales. They justified their choice with their attempts at balancing work and family life and with their commitment to develop young salespeople.

The strategies that managers used to achieve their interests and the role of representations of performance data therein were obtained by coding their answers to two questions, “what does it take to be successful at [M-Tel],” and “how are you going to achieve that [after a manager discussed her goals].”

Each answer was separated in three parts: descriptions of achievements necessary to achieve their interests (e.g., “making your numbers”), descriptions of representations of performance data necessary to achieve their interests (e.g., “keeping Siebel updated”), and descriptions of strategies that linked managers’ interests to achievements or to the representations of achievements (e.g., “show that you’re leadership material”).

I arrived at two sets of strategies. Both were based on impression management practices that mobilized achievements and their electronic representations. One, presenting compliance, linked managers’ interests to attempts at impressing their leaders supported by electronic representations of sales above sales targets. The other, presenting over-achievement linked managers’ interests to attempts at impressing their leaders supported by electronic representations of sales above those reported by other managers.

Elements of structure shaping managers’ participation in the production of performance data were elicited from their descriptions of the relationships of authority and prescribed procedures at DeskSales. I coded these descriptions for the parameters of design outlined in research on organizational structure (see Delery and Doty 1996; Mintzberg 1979).

Managers emphasized prescribed reporting procedures as the most prominent element of organizational design that shaped their participation in the production of performance data. They described it as a constraint upon their role in this process.

Elements of culture shaping how managers presented an image of compliance or over-achievement were elicited from their answers to three interview questions: “how do you feel about DeskSales,” “what is your team like,” and “how do you feel about Siebel.” I coded these answers for descriptions of behavioral norms (see Archer 1996; Kunda 1992) and separated those that managers related to their role in the production of performance data from those that they did not.

I found three norms related to the production of performance data: competitiveness, lax morals and lack of a sales culture.

The different representations of performance data in the unit were distinguished based on the artifacts that scaffolded each representation, the data in each representation, the role of employees, managers and leaders in each representation and their intended audience. I distinguished three representations of performance data: sales records, monthly team reports and monthly unit reports.

The artifacts used to scaffold each representation were coded by noting the technology that managers used to convey the performance data to their leaders. I found three different material artifacts, Siebel records, Microsoft Excel spreadsheets and Microsoft PowerPoint presentations.

The performance data recorded and reported in each representation were coded by listing the headings of each graphical or tabular representation in these documents. Performance data included information about individual sales, information about salespeople, information about sales teams and information about DeskSales as a unit.

The role of managers and leaders was coded from interviews and observations where they discussed the production of each representation of performance data. I distinguished two roles in the data. Leading a representation of performance data consisted on helping others or ordering them to produce a representation of performance data. Reading a representation of performance data consisted of using it to understand competitive dynamics and organizational processes and to assess the work and achievements of the people whose performance was represented therein.

Intended audiences were coded from interviews where managers discussed the production of performance data. Intended audiences were those that managers identified as the recipients of performance data prescribed by M-Tel’s policies.
Table 4. Data Analysis Procedures (Continued)

<table>
<thead>
<tr>
<th>Step 5: Specifying the Production of Representations</th>
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</thead>
<tbody>
<tr>
<td>Practices were culled from observations where leaders, managers and employees were working on, or talking about the production of representations of performance data.</td>
</tr>
<tr>
<td>For each practice, I noted people’s what people did, their account of what they did and their account of the opportunities and constrains upon what they did.</td>
</tr>
<tr>
<td>The relationship between expressions and representations was specified from observations of managers’ interactions with their leaders. I followed Goffman’s (1959) dramaturgical model to define two types of relationships between managers’ expressions in interaction with their leaders and the performance data that they provided to their leaders.</td>
</tr>
<tr>
<td>Representations of performance data could either confirm or disconfirm managers’ expressions about their employees’ achievements and their role therein. I coded my observations as evidence of confirmation when performance data matched managers’ claims in the expressions of achievement in interaction with their leaders. I coded my observations as evidence of disconfirmation when performance data did not match those expressions.</td>
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<tr>
<th>Step 6: Specifying the Role of Audiences</th>
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<tr>
<td>The role of leaders as audiences from was specified leaders’ responses to representations of performance data.</td>
</tr>
<tr>
<td>Three sources of data were triangulated to code these responses. One were my observations of leaders’ use of performance data. Another were leaders’ descriptions of their use of each representation of performance data. The other were managers’ accounts of their leaders’ use of performance data. These two last sets of descriptions were culled from interviews and from naturally occurring conversations between leaders and their managers.</td>
</tr>
<tr>
<td>I surfaced four reactions of leaders as audiences to representations of performance data across two types of interpretations. Leaders used performance data to make sense of the outcomes of their decisions and they used performance data to evaluate their managers. Independently of how leaders used representations of performance data, they either took the data therein at face value as an accurate portrayal of performance or they took performance data as inaccurate hints of the accomplishments of managers.</td>
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Sales managers used two strategies to reach these goals. Some, such as Nathan used a strategy that he described as “showing that you’re reliable, that they [i.e., leaders] can depend on you” and Roger described his own strategy as being someone who “always delivers the goods.”

You need to keep on top of your numbers and always operate against your [sales] forecast: you try to keep score of how much the gap is so that they know how much they [i.e., salespeople] need to close, … you need to manage that gap to make sure that you’re never caught with your pants down.

Other sales managers such as Steve argued that improving their career required “a killer attitude” or what Jeremy described as “proof that you’re face-to-face material,” that is, someone who can lead a field sales team. Jeremy wanted his team to “smash the [sales] targets” and “beat the other teams”:

I need to make Andy [the head of M-Tel’s salesforce for companies in the banking industry] believe that I’m the best [sales manager at DeskSales]. I want to show him that I’ve got what it takes to go face-to-face [i.e., move to a field sales team].

Both strategies emphasize the role of leaders’ impressions in managers’ career chances and link those impressions to performance data.

The Structuration of the Production of Performance Data by Sales Managers

Sales managers emphasized two elements of DeskSales’ organizational design that affected their participation in the production of performance data to impress their leaders. The first was prescribed reporting procedures. Peter complained:

Reporting [is] a hassle, it’s very detrimental…. Looking at the bigger picture I know why it’s there. It’s a brilliant tool but it stops you doing your job…. [It’s] something that you don’t want to do. It’s a complete pain on the neck, to be honest…. For the individual at my level, you have to make sure salespeople input all the data, make sure it’s all correct, put it all in a report, that’s a tedious task, but if you don’t it will look like you’re not doing your job.

Sales managers situated their attempts to impress their leader in DeskSales’s “aggressive culture,” and “ruthless environment.” Simon stated:

[I feel that I’m] in an environment that is cutthroat—you’ve got to do your job and you’ve got to do it well…. You need to show that your people are doing their job and show that you’re doing your job, and it’s like that all the way up.
The second was the ethics-in-use that they read in the practices of their general manager. Nathan explained:

There’s too much weight placed on the system and on the importance of what it’s saying but I think that our general manager and people around her, our top management team at DeskSales, I do think they know that but so long as the system is telling a good story, it pushes their political agenda, it always makes them look good because people accept Siebel as being the truth…, so they’re happy for people to put down on Siebel, “I’ve sold 350 K” whether it’s true or not. As long as it says what they want it to say, they’re happy…. This creates a culture where people think it’s OK to manipulate the figures.

Sales managers took advantage of this lax ethical culture to participate in the production of representations of sales work that warded off the threats imposed by competitive career dynamics.

**Producing Monthly Reports to Give Representations of Compliance or Overachievement**

Sales managers emphasized that their monthly team reports, although burdensome to prepare, allowed them to shape the image that their leaders had of them. Sales manager Jeremy explained:

If our report looks better than everybody else’s, it always looks like we’re doing more business. But it’s just perception and that’s the problem…. If you get the perception to look in a particular way, you convince people, but the reality might be very different...there’s a lot of that here [at DeskSales], the perception is more important to people than the reality. We don’t want people to know what the reality is because everybody wants to look the best.

Sales managers attempted to improve the image they presented through monthly team reports by instructing salespeople who had logged enough sales to reach their targets to record any revenue they had not yet entered into Siebel. Salespeople did not increase their bonus by reporting revenue above their monthly target but sales managers needed them to do so to achieve their team’s combined sales target. In his team meeting of March 23, 2003 (see Finance 2’s sales figures up to March 2003 in Table 2):

Nathan asked his sales people, “Knowing that we have a gap of 1 million [accumulated over the finan-

Sales managers also increased the sales in their monthly reports by instructing their deputies (salespeople that helped prepare their team’s reports) to report more sales than what salespeople had recorded in Siebel, even if the team had reached its combined target:

Two days before [his team] report [for August 2003] was due, Jeremy sent the a short email message to salesman Ted who acted as his deputy. Jeremy wrote that, “This month we only have a 35K gap, it shouldn’t be difficult to make this go away in the report.” Ted interpreted this as a request to “fiddle our spreadsheet” to match the team’s target. He said that Jeremy “is great at cooking the figures, he’s my chef and I know how to wear his hat.” He changed his team’s sales figures in the report joking, “I’ll be doing a little cooking of my own, I may even make an omelet.”

These two tactics emphasize the dramaturgical over the functional role of team reports. Managers used these reports to impress leaders by manipulating data on salespeople’s sales rather than using them to inform leaders by compiling the actual sales that salespeople recorded (compare entries in the ‘Siebel’ rows with entries in the “team reports” rows in Table 2).

DeskSales’ general manager reacted to reports that represented compliance with sales targets by praising sales managers in public. In an email message to all sales managers on December 7, 2002, Mariah wrote:

CONGRATULATIONS FINANCE1,

It is with pleasure and pride that I announce that FINANCE1 has achieved its yearly target a full quarter before the end of the year due to its fantastic streak of sales successes. Being the first team to reach this target highlights the great sales orientation and sales culture of the team and their collective passion to achieve.
Mariah reacted to reports that represented noncompliance with sales targets by admonishing sales managers. Steve described a meeting with Mariah after his team had failed to reach its sales targets for the month, complaining that:

I got shredded in that conference room…. We as a team need to do something about the numbers. I try and defend our court but at the end of the day the fact that Finance is a difficult sector is irrelevant and the fact we are so far behind looks bad. It’s not pleasant [to be] constantly hearing how appalling the [team’s] numbers are.

Mariah also conducted “account reviews” with sales teams that reported sales below target. Sales managers described account reviews as “dangerous” experiences in which “you could really get shafted.” Mariah sat with each desk salesperson on a sales team and went through their records for open sales in Siebel. Sales manager Jack described an account review thus:

[Mariah] drilled them [i.e., salespeople] down on every major opportunity, she had was very knowledgeable on all the major opportunities [ie. open sales records in Siebel]. It was very scary, it was almost like an interrogation. Nobody was really prepared for it, [salesman] Paul was able to survive it but the rest of them were going “oh, my God!”

Sales managers improved the sales that salespeople reported in Siebel to avoid or address the threats any scrutiny might raise for the image they wanted to present to their leader.

### Shaping Siebel Records to Give off Representations of Compliance or Overachievement

Sales managers described Siebel as a “shop window,” or a “shop front.” Roger warned his team that “Siebel is completely transparent … everything we do is highly visible, it’s fully on the radar.” Jack emphasized the impression management opportunities of Siebel, “If you want to shine, Siebel is the way to shine, don’t be shy and put your successes in Siebel.” As such, Siebel records joined team reports in mediating sales managers’ attempts to impress their leader.

Siebel could damage a sales manager’s image because salespeople occasionally missed their sales targets (see the “Siebel” row in Table 2). Sales managers found two causes for salespeople’s underachievement, which they addressed with two different sets of tactics. First, some tactics addressed salespeople’s unwillingness to use Siebel. Nathan complained that:

Siebel is a tool that [salespeople] don’t use … [because] Siebel only takes half an hour a day, but that’s half an hour less that they’ll spend talking to customers.

He and other sales managers admonished their salespeople to make them report sales in Siebel. Jack sent an email on January 5, 2003, chastising his team:

One person on the Team (Joe Smith) has achieved 100% of target, this is 90% overall, the majority of the team’s target. Joe has not done anything that anyone else cannot do if they put their mind to it. 4 people have yet to sell anything this YEAR ….Very disappointing!!!! I’m getting considerable grief because as a team we cannot do the basics…. Everyone should be on 63% against target by now. I have reiterated this now with almost boring monotony, what else do I have to say to help you understand its importance[?]

Sales managers also induced salespeople to report revenue as sales in Siebel with small prizes such as bottles of champagne and shopping vouchers, which Nathan described as a “little incentive from my [discretionary expense budget] to keep them motivated.”

The second set of tactics addressed salespeople’s lack of sales skills. Steve explained:

A lot of the people that [DeskSales] employed, because we had to employ 70 people in a short space of time … didn’t have a job, so you’re taking on unemployed, show them how to use the systems and all they’re doing is managing their email, managing systems. They don’t sell, they just … do a lot of work that they’re not supposed to do.

Sales managers also devised tactics to address salespeople’s lack of sales skills by helping them scavenge revenue to report as sales of their own. Salespeople could find records of customers’ orders in M-Tel’s information systems. However sales managers told them to contact M-Tel’s service units for expediting their customers’ service requests, expecting customers to call the salespeople to place orders if they proved reliable in helping customers thus. Nathan told his team:

You need to become your customer’s central point of contact. You have to push Service to deliver for
your customers. That’s the only way to educate them [i.e., customers] to call you when they need help….You’ll get tons of service requests but you should also get plenty of orders [that] can add up to a pretty nice OTB [on-target bonus].

Sales managers also instructed their salespeople to offer their help to field salespeople with Siebel in return for taking credit for some of field salespeople’s sales. In his team meeting of July 20, 2002, sales manager Jack told his team:

Imagine coming home after being a whole day on the road knowing that you have to update 20 opportunities and do a sales plan for every single one before you can sit on your couch and watch TV…. You can build a strong relationship with your accounts [i.e., with field salespeople] by simply offering to do their Siebel for them. It’s only a matter of paying attention to their opportunities and add some notes [i.e., enter information in a free-text “notes” field] once in a while. Sure, you’ll have to do the odd sales plan, but you only need to do it at the beginning. Just make sure they throw some sales your way!

This practice took advantage of the difference between field salespeople’s and desk salespeople’s incentives. Field salespeople were paid a bonus if the revenue for their accounts recorded in M-Tel’s invoicing system matched their annual target. Desk salespeople were paid a bonus if the sales they recorded in Siebel matched their monthly targets. This meant that field salespeople did not lose any bonus for allowing desk salespeople to report some of their sales. Saleswoman Virginia explained that “doing field salespeople’s Siebel” did more than just provide sales that desk salespeople could report as their own:

You can put whatever you want on Siebel because you know they’re not going to say anything! Why would they? They can come home and rest knowing that we’re doing all the donkey work for them.

Salespeople traded the burden of updating field salespeople’s records in Siebel for part of their sales and their silence, if not their collusion, when reporting revenue as their own sales.

Sales managers helped salespeople hide evidence that salespeople were recording compliance with sales targets in Siebel without doing any sales by instructing them to pretend that they were progressing an opportunity through all the stages of the sales process. In his team meeting of December 2, 2002, Nathan explained to his salespeople:

If you look on Siebel, we have a very high conversion rate [the ratio between sales opportunities and closed sales]. We don’t want [sales] opportunities to be [created] at 100% probability [i.e., recorded as a closed sale], that looks very reactive…. Hold them and log them at a lower probability and close them a few days later. We need to follow all steps [i.e., the opportunity stages in Siebel] because it puts them [opportunities] on the radar early.

Sales managers also prepared their salespeople to withstand the scrutiny that account reviews imposed on salespeople’s Siebel records. Sales manager Simon sent an email message to his team stating that an upcoming account review could be “a day of reckoning”:

We need to do a brainstorming … we’ll go into the orange room and we’ll make sure that we go over every possible question [Mariah] can ask…. You need to make sure you all know your current opportunities on the system inside out. Talk to your account teams today if necessary. We must not appear to be unprepared for this, so let me know if I can help.

Managers’ attempts to enforce the production of Siebel records emphasize that the agency in the production of performance data lies with people, not technology. Their efforts to shape the temporal structure of salespeople’s production of Siebel records show that even when the use of information systems is recorded unobtrusively and automatically, people can still produce performance data that support the image they want to present.

Using Performance Records and Reports for Impression Management

Sales manager Jeremy attached his monthly report for June 2003 to an email message to sales manager John (who compiled the reports from the eight desk sales teams into a single file) that summarized how sales managers succeeded in using monthly reports and Siebel to impress their general manager:

As requested, Retail productions proudly present “the Numbers” a story of love, greed, tragedy and intrigue and fudging. The leading man… (Mr. [Jeremy] Smith) is showing another powerful performance in this epic story. He has barely recovered from the scars of last week’s beating by the evil [Mariah] to show dramatic improvement by smashing his targets.
Sales managers were able to present an image of achievement despite salespeople’s inability to sell and their unwillingness to use Siebel. This created a wide gap between salespeople’s work, which consisted of assisting their customers and field salespeople in return for reporting customers’ purchases and part of field salespeople’s sales as the outcome of their own saleswork, and its representation in Siebel, which portrayed them as successful salespeople. The message that DeskSales’ general manager wrote to announce that sales manager Mitchell was moving to M-Tel’s marketing department highlights the image that sales managers were able to present thus:

I am delighted to announce Mitchell’s promotion to the role of B2B marketing manager. In addition to being consistently ahead of target (currently 89% ICT, 124% Retail, 99% overall), Mitchell receives regular accolades from his happy customers….All three members of the Retail directorate who made it into the top 20 [salespeople in the unit] were in Martin’s team … a testament to his leadership skills.

This image contrasted with how Mitchell described his own experience at DeskSales:

I feel like a captain in the eastern front [in World War II] reporting to a faraway command center saying that everything is going as planned when, in reality, my soldiers are being slaughtered.

He explained:

My [desk sales people] have been working for [M-Tel] for a year and they don’t really sell anything, they just get along really well with their accounts [i.e., their customers] and put their orders in Siebel.

Salesman Tim summarized managers’ use of monthly reports and Siebel to reproduce this gap:

[DeskSales’] success has not been from adding value, we’re just good at working the system…. Sales managers are stats driven. They have to produce spreadsheets day in and day out and they can only talk about figures. They call it “feeding the monster,” because it took so much of their time.

He explained:

Siebel is like the invisible voice and our sales managers are the little monkeys around the organ grinder …. Siebel is the organ grinder and our sales managers are the monkeys. It’s the only way I can describe how our sales managers work.

This interpretation suggests that sales managers reproduced some of the conditions that shaped their use of performance data to impress their general manager, including the reporting procedures and the lax ethical culture that allowed them to present an image of compliance by motivating and helping salespeople to find revenue instead of motivating them and helping them sell (see Figure 4). DeskSales’ general manager further increased the disparity between salespeople’s actions and achievements and the sales and saleswork she reported to the unit’s steering committee to present an image of over-achievement.

The Production Performance Data by the General Manager

DeskSales’ general manager Mariah described her ambitions by confessing:

I see the desk being its own directorate [i.e., M-Tel’s sales department would be replaced by a field sales and a desk sales department] and I want to be the one in charge of it.

To reach that goal, she ran “a great PR [public relations] campaign for [DeskSales].” She described two channels to do so. The first channel was the meetings in which she presented her monthly unit reports to DeskSales’ steering committee. In these meetings, the members of the steering committee were “normally quite all right as long as we’re making our numbers … they don’t ask too many questions.” The second channel was performance data. She explained that she used Siebel to “sell the DeskSales to its internal clients [i.e., the unit’s steering committee].” Siebel made that task “much easier, [because] if you don’t have a shared system people will think that you’re just making up numbers, with a shared system it’s totally transparent.” She used Microsoft PowerPoint to prepare monthly unit reports instead of Siebel because PowerPoint “makes us [i.e., DeskSales] look more professional.”

DeskSales’ structure and culture shaped Mariah’s attempts to impress her leaders with performance data. Mariah complained that salespeople’s lacked a “sales culture” and had “a call center mentality.” She argued:

I don’t necessarily think that we have a salesman culture up there [at DeskSales]. The behavior of most people upstairs is very reactive. I get the feeling a lot of the guys are laid back and not feeling much pressure.
Assistant manager Tom argued that Mariah was a victim of another set of norms imposed by the head of M-Tel’s sales force:

Garreth [E-Tel’s sales vice president] is a dictator, [M-Tel’s sales organization] is full of aggressive young people willing to do anything to get ahead. Mariah wants to look great at the end of her first year and then move on, that’s why she is doing all this false accounting flogging people so hard. She may get there on a dead horse but she’ll get there.

Mariah described reporting procedures as an element of M-Tel’s organizational design that supported her attempts to present DeskSales as a viable addition to M-Tel’s sales force:

If you look at each [desk salesperson], they’re bringing X dollars. Yeah, you’re paying $26000 for him but he’s helped bring 4 million dollars this year. You know, they [M-Tel’s top management] could turn around and say, “Right, I could get that money in with or without them anyway,” but they never know that. I think the reports show the value we add to the accounts.

Mariah took advantage of these conditions to improve the image that salespeople and sales managers created in Siebel records and monthly team reports.

### Producing Monthly Reports to Give Representations of Overachievement

Monthly unit reports were Microsoft PowerPoint presentations that compiled the monthly team reports prepared by sales managers. DeskSales’ general manager used two tactics to improve the image that she presented in these reports. The first tactic consisted of adding narratives that idealized salespeople’s achievements. On August 18, 2003, she sent the following email to desk sales managers:

REPORTING WINS is key. I’m attaching [a] form … to include an account of [salespeople’s] involvement of each team’s top 3 wins in our monthly report. Once you have closed a deal, make sure all the relevant areas of Siebel are updated and … then send the completed form over to me.

Six days later, she received the following account from desk salesperson Tim:
Joergeson’s was looking to take advantage of a Group International deal since April.

I provided information to the customer regarding this, and used field specialist to price the equipment. This was followed by to-ing and fro-ing by the customer on required equipment levels and several quotes.

Mariah added an improved version of this narrative to the monthly unit report for that month titled, “DeskSales Win: Joergeson’s team win 1.37 million deal and show value of the DeskSales integration!!”

Joergeson’s, a … successful grocery-chain whose name is synonymous with progress, have leaped forward once again and cashed in with DeskSales first $1M Win!

Tim Morris, the desk salesperson’s in the Joergeson’s account team seized an opportunity to progress [a] deal which had been sitting low on the [field] sales team agenda since April … By showing the customer that signing the contract would save them 20K per quarter on international calls … Tim gave the proposal the required burst of direction, which proved to be the driver needed for Joergeson’s to sign the deal.

The second tactic consisted of increasing the sales revenue in monthly team reports by instructing Tom and Jim, the two assistant managers who prepared these reports, to introduce fake sales whenever individual sales teams were below their monthly target. On June 25, 2003, both Tom and Jim received an email from Mariah that stated:

The numbers for FINANCE2 and RETAIL4 are not quite up to par this month. I understand the issues related to Siebel, but at the end of the day you guys should be able to do something about it. The sales managers have done the best they can using the systems, but … I would like instead to go with the figures that you guys pull together. This will involve some manual adjustments - but it is very much worthwhile to demonstrate to [Garreth] and all his team the amazing start to the [fiscal] year that we have had.

On reading the email, Tom complained, “I have certain values that I need to uphold.” He was disturbed by the message that he interpreted as a request to “lie about sales figures.” Jim confessed that he had been asked to do the same before. He described monthly unit reports as “fabrications to make the unit look good.” Mariah’s requests and Tom and Jim’s response to its implications underscore the precedence of dramaturgical over functional goals in the production of monthly team reports.

Mariah faced two different reactions to monthly team reports. On the one hand, the DeskSales steering committee reacted to her monthly presentations of the unit’s performance data as evidence of the valuable role of DeskSales in M-Tel’s sales force. In her presentation of the monthly unit report for January 2003, Mariah presented a slide titled “1492 handoffs rejected to date.” This slide presented information about the 1,492 opportunities that Siebel automatically prompted desk salespeople to assign to field salespeople (handoff) because of the complexity of the products involved. Mariah told the steering committee, “Now this is where it gets interesting, look at the reasons [that desk salespeople reported in Siebel for rejecting the handoff]: ‘[desk salesperson] can handle’ is the [biggest] one.” She showed the next slide and said: “look at these conversion rates,” pointing to the 94 percent proportion of open opportunities that were successfully closed as sales (the remaining 6 percent were “lost” because the customer did not buy). She bragged, “There is a change in culture! The culture is changing!” One of the members of the steering committee agreed, “They’re [i.e., desk salespeople are] really bringing in the numbers,” and another congratulated Mariah, “That’s really great, impressive!” Assistant manager Jim had another interpretation for those numbers, “Nobody gets conversion rates like that, … it’s plain that [desk salespeople] are just bloody order takers!” However, the DeskSales steering committee accepted this and other performance data in monthly reports at face value. Assistant manager Tom complained:

There’s too much weight placed on the system and on the importance of what it’s saying about our GM [general manager]. Our top management team, I do think they know that but so long as the system is telling a good story, it pushes their political agenda, … it always makes them look good because people accept numbers as being the truth. People accept the system as … the yardstick so they’re happy for people to put down, “I’ve sold this or that” even if they’re only sticking their names on stuff. As long as it says what they want it to say, they’re happy.

On the other hand, the apparent success that DeskSales was enjoying caused suspicions from managers in M-Tel’s upper echelons. Assistant manager Jim feared:

The time will come when they have the final year figures and the final year figures [will be] down [i.e., actual sales will be below sales targets] because they
are down overall. [Top management] is not going to say that “DeskSales is doing a wonderful job,” [they’ll] say “if the final year figures are down, then we’re doing something wrong here.” And then [they’ll] look at DeskSales and say “look at all the revenue they brought in…” [They]’ll say, “hang on, let’s have a look at the value, the real value that DeskSales brought in, is this an actual big number? Because if it is a big number and we’re down anyway, then what the hell is going on with the rest?”

These suspicions resulted in frequent visits from managers at the level of those in the DeskSales steering committee and above to ascertain how they achieved the amount of sales that they reported. When Frank, the head of M-Tel’s field sales-force, first visited the unit, he met some salespeople including Jeanne:

Frank insisted with Jeanne in front of Mariah, “I want to know the truth about this place, I need to know the truth.” Jeanne replied “I have a suggestion for you,” and at that point Mariah interrupted saying, “Have your next meeting here [in the city DeskSales is based].” Jeanne said that she was actually thinking about Frank having a desk salesperson in their next meeting. Mariah replied that “a sales manager will be enough.” Later, Jeanne reported that when she first said that he wanted to make a suggestion, “I could see Mariah’s face white with fear, I could say anything, she was not in control!”

Mariah increased the sales that salespeople reported in Siebel to prove compliance in monthly reports and to reduce the risk of exposure from visits to the unit.

**Shaping Siebel Records to Give off Representations of Overachievement**

DeskSales’ general manager Mariah shared the interpretation that the desk sales managers had of Siebel as a “shop window,” in which desk salespeople should “put every little bit of revenue that we can find and sing it from the rooftops.” Assistant manager Tom, who prepared monthly team reports for Mariah explained that by using Siebel thus:

I think that has a negative impact on the actual fiber of what’s going on and it becomes fluffy, it becomes like politics, it becomes like a spin doctor. You can manipulate statistics in any way you want. You can make them tell whatever story you want them to, just by picking the right figures. I really think that systems are given too much recognition. It’s not the be all and end all. I really don’t think it should be.

He argued that, “off the record [Mariah] would say that it’s a shame that Siebel doesn’t tell the truth about what’s going on, but we need to play the game.” Assistant manager Jim emphasized the threat that Siebel presented for DeskSales and its general manager:

I think that if they had a closer look at Siebel at the head office, they would see that all we have done is that we have found ways to put the salespeople’s name on accounts [i.e., revenue]. It’s just double accounting, I mean … [there are] people that have been locked up on false accounting and yet that’s all they’re doing upstairs, it’s just false accounting!

Both sets of interpretations emphasize the dramaturgical over the functional role of Siebel in the relationship between DeskSales’ general manager and her leaders.

Mariah used two tactics to ensure that she took advantage of, and was not threatened by, her leaders’ use of Siebel to form impressions of her accomplishments. First, she improved the image that she could convey through monthly reports by improvising incentives for persuading salespeople to report revenue in Siebel. On May 26, 2003, she sent the following message to all salespeople:

If you want a very easy way to earn more bonus I strongly recommend that you read on…

Prospecting for small switches is just about the easiest thing to [do] in the roles that we have. You just need to talk to your clients and ask them if they have ordered any new switches.

This is a massive opportunity for you all to make inroads to your sales target. We have had a slow start … in Q1 [first quarter of the financial year] and I am looking for a massive kick start from this initiative, additionally I’m paying “double bonus” [i.e., doubling the percentage of desk salespeople’s bonus] in Q1 for all deals won this way.

Second, Mariah coped with the exposure that Siebel imposed on salespeople’s work by preparing them for the questions about sales records that other managers and leaders asked of salespeople when they visited DeskSales. A few hours before a visit from the head of M-Tel’s sales force, Andy, a salesperson in one of the technology and media teams, said, “You could read in their [sales managers’] body language how afraid they were.” He explained that his team had rehearsed for questions about their opportunities in Siebel, “She [i.e., Mariah] made us spend the past two days rehearsing so that it all sounds natural.” He added that Mariah was “in panic for
the past two weeks, but today… I’ve never seen so much panic in this unit.” Mariah suffered from the same dramaturgical hazards that she imposed on her sales managers through account reviews and used a similar tactic to avoid them.

**Using Monthly Unit Reports for Impression Management**

Mariah made the gap between salespeople’s everyday work and the representation of their activities and achievements in Siebel wider than that created by sales managers. In a report of his experience at DeskSales, assistant manager Tom summarized the production of performance data in the unit thus:

[Desk sales managers] are able to manipulate the data … to make representations to their hierarchy, that further their own interests. At a higher and more senior level, the management team can implement tactics within the business unit, which ensure that they too are manipulating the data, to further their own political agenda, and appease the directors of the company.

Whereas sales managers emphasized their own role in creating the gap between work and its electronic representation, Tom emphasized the role of leaders in reproducing this gap. The DeskSales steering committee kept the gap between work and its representation wide because they used performance data in their own attempts at impression management, instead of using it to monitor DeskSales’ compliance with goals and procedures.

Mariah was successful enough at taking advantage of this gap to impress her leaders that DeskSales doubled its number of salespeople at the end of its first 18 months, and doubled it again 9 months later. The way M-Tel’s sales vice-president announced Mariah’s first promotion, two years after she joined the company to lead DeskSales, highlighted the image that Mariah was able to present. In a call with all the managers in M-Tel’s sales organization, he said that Mariah “will be a very tough act to follow.” He announced that DeskSales had sold $231.9 million which far exceeded the “super-stretch target” of $175 million. He concluded:

[DeskSales] has only just scratched the surface … who knows how far we can take this?! We can be generating 300 million dollars or even 500 million dollars in the near future.

Mariah climbed M-Tel’s corporate ladder quite quickly. Five years after she was recruited to run DeskSales, she had risen to a position in the company’s board of directors.

Assistant manager Jim summarized Mariah’s leadership as follows:

Mariah places all her emphasis in the system and in using the system to tell [DeskSales steering committee] what they want to hear, not the truth. By putting so much emphasis on what the system says, you’re inviting people to tell lies. To manipulate the truth. Nobody is actually checking how good they are at doing business, they’re just going with what the figures say….it’s too tempting to be able to go and tell [sales managers] that “it has to show this” so that when [top management] looks, they see [desk salespeople] selling almost as much as an account manager [i.e., a field salesperson] which would then convince them to replace account managers with more [desk salespeople] which will make my business unit bigger, which makes my chances of being a director better and increases the temptation to do that, to accept the numbers as long the system tells the story that you want it to tell.

Jim emphasized how Mariah’s participation in the production of performance data reinforced the reporting procedures and the lax ethical culture that shaped sales managers’ attempts to use monthly reports and Siebel to impress her (see Figure 5).

The goals, constraints, and practices that defined the roles of sales managers and of DeskSales’ general manager in the production of performance data, and the role of reports and Siebel therein, specify an exploitive specification dramaturgical model of the production of performance data.

**A Dramaturgical Model of the Production of Performance Data**

My research at DeskSales shows that preventing electronic records of work that threaten the image that managers present to their leaders is just one specification of a broader dramaturgical model of the production of performance data. It also suggests another, exploitive specification that explains how managers produce, or enforce the production of, performance data to impress their leaders beyond the image supported by their employees’ work (see Figure 6). Next, I outline the two steps of the production of performance data in the exploitive specification. I compare it with the protective specification of the dramaturgical model and contrast both with the functional model of the production of performance data.
Figure 5. The Dramaturgical Production of Performance Data in the General Manager/Steering Committee Relationship

Figure 6. The Exploitive Specification of a Dramaturgical Model of the Production of Performance Data in the Manager/Leader Relationship
The Dramaturgical Production of Performance Records

The first step in the production of performance data consists of recording employees’ work in information systems. In the functional model, managers participate in the production of performance records to obtain, and to provide their leaders with an accurate representation of employees’ actions and achievements. They enforce information systems to strengthen the link between work and its representation and turn performance records into an exhaustive and detailed account of employees’ activities and accomplishments that they then use to monitor and enforce compliance and that their leaders then use to determine strategy and monitor its implementation (El Sawy 1985; George 1996).

In the dramaturgical model, managers participate in the production of performance records to provide their leaders with a glorified representation of employees’ work. In the protective specification of this model, they weaken the link between work and its representation by using and by enforcing uses of information systems to hinder the production of performance data (Gwillim et al. 2005; Zuboff 1988). Managers ensure that performance data only include the fraction of employees’ work that supports the image they want to convey to their leaders.

In the exploitive specification suggested by my research at DeskSales, managers weaken the link between work and its representation by using and enforcing information systems to manipulate the production of performance data. At DeskSales, managers improved the records of employees’ sales beyond their actual accomplishments to produce performance data that impressed their leaders. Sales managers’ ability to shape salespeople’s use of Siebel to pretend that they were progressing opportunities through the sales cycle shows that managers can weaken the link between work and its representation, even when records of employees’ work are produced automatically. In both the protective and the exploitive specification, managers and leaders use performance data to show compliance upward, rather than monitoring it downward.

The contrast between the roles of performance records and performance reports in managers’ attempts to impress their leaders at DeskSales suggests that performance records have a dramaturgical role different from that of other representations of performance data: performance records transpose to the production of performance data the tactics that people use to give off expressions for impressing others in interactions. Performance records are representations given off because they are electronic representations that leaders interpret to be a byproduct of employees’ work, a safe source of information to check on the image that managers attempt to convey, and that managers interpret as an opportunity to corroborate the image they present through reports and in the interactions that these representations mediate.

Salespeople’s reactions to sales managers’ attempts to enforce the representation of sales in Siebel suggest that representations given off are more cumbersome tools for managers to use in attempting to impress their leaders than expressions given off because representations given off are not provided directly by managers, as expressions given off would be (see Goffman 1959, pp. 7-8), but rather depend on employees’ ability and willingness to produce performance records that are good enough for managers to impress their leaders. My research at DeskSales shows how much effort managers may have to exert, and how many difficulties they may face, to enforce the production of representations given off upon employees. Sales managers needed not only to motivate but also to help salespeople report enough work to support the image that managers wanted to convey. This burden is only part of the everyday work of using performance data for impression management. The rest consists of producing reports in which managers can showcase their promise and potential.

The Dramaturgical Production of Performance Reports

The second step in the production of performance data consists of compiling and summarizing records of employees’ work (or reports from subordinate managers) into performance reports. The functional model suggests that managers summarize and interpret performance records into performance reports that help their leaders monitor compliance with prescribed procedures and planned strategies (McBride 1997; Walstrom and Wilson 1997).

In the dramaturgical model, managers produce performance reports that enhance performance records. In the protective specification, managers use reports to downplay any performance data that jeopardize the image that they want to present to their leaders (Zuboff 1988). In the exploitive specification suggested by my research at DeskSales, managers use performance reports to improve the performance data in records of employees’ work. At DeskSales, sales managers asked their salespeople to record additional sales just before performance records were due, and then their general manager added narratives that boasted the largest sales reported in Siebel. She and the sales managers also entered false sales into their monthly team reports to add to those that salespeople had recorded in
The protective and exploitive specifications define the dramaturgical role of performance reports as representations given because they transpose to the production of performance data the tactics that people use to give expressions that impress others in interactions. Performance reports are representations given because they are electronic representations of work conveyed through prescribed or shared symbols, such as charts, graphs, and tables, that leaders read as summaries and interpretations of employees’ work that managers produce for their benefit, and that managers use as an opportunity to improve the data that leaders use to form impressions of managers’ promise and potential.

The praise and promotions that sales managers and the DeskSales general manager obtained by producing performance reports thus expose the breadth and depth of the power that managers wield to produce performance data on their own. My research at DeskSales suggests that when managers choose to use their role in the production of performance reports in this way, they face few obstacles in presenting an image to their leaders that goes well beyond the data recorded and reported in the information system. It suggests that representations given can be as effective as, if not more effective than, expressions given in managers’ attempts to impress their leaders.

The Structuration of the Dramaturgical Production of Performance Data

My research at DeskSales suggests that the functional model and the two specifications of the dramaturgical model can be distinguished by the different interests and different elements of structure, culture, and resources that shape managers’ participation in the production of performance data. The functional model argues that managers participate in the production of performance to inform their leaders because of their shared stake in their company’s performance, reinforced by a collective organizational and occupational culture (Volonino and Watson 1990; Watson 2001), by procedures that prescribe shared goals for each level of management in the strategy process (Cooper and Wolfe 2005; Miller 2001), and by managers’ use of information systems to share information about their activities and accomplishments with their leaders (Garud and Kumaraswamy 2005).

Comparing the exploitive specification that I induced from my research at DeskSales with the protective specification of the dramaturgical model suggests that managers participate in the production of performance to impress their leaders because of their individual stake in their own careers (see Markus 1983). This divergence among managers interests is reinforced by a
My research suggests two factors that steer managers toward either suppressing or idealizing performance data to impress their leaders. The first is the ethics-in-use that define the acceptable practices to win the race to the top of the organization. Sales managers’ descriptions of how the ethics-in-use of their general manager shaped their tactics to impress her point toward norms that are more permissive than those implicit in studies that document the protective specification (e.g., Orlikowski 1991; Zuboff 1988). In these studies, deviance only entails acts of omission that do not go beyond sabotaging the production of performance data. The impression management practices at DeskSales were acts of commission that went as far as falsifying performance data. The structuration of ethics-in-use at DeskSales also contrasts with that implied in cases of the protective specification because, at DeskSales, managers reproduced norms that amplified the ethics-in-use enacted by their leaders instead of enacting moral norms of their own to resist those enforced by their leaders (see Lapointe and Rivard 2005; Pinsonneault and Rivard 1998).

The second factor steering managers toward one or the other specification of the dramaturgical model is the temporal structure of reporting procedures. Research on resistance to IT emphasizes the structuring effect of the continuous production of performance data on managers’ attempts to protect their image from unflattering performance data (Hirschheim and Klein 1994; Sia et al. 2002). The monthly cadence of the production of performance reports gave managers at DeskSales enough time to improve revenue that salespeople recorded in Siebel. They did so by introducing reporting procedures of their own that weakened the structuring effect of those imposed by the company. This contrasts with, but complements, how managers weaken the structuring effect of reporting procedures by excluding their employees’ work from information systems to preserve the image they want to present to their leaders (Sewell and Wilkinson 1992; Zuboff 1988). In one, improvised procedures substitute for prescribed procedures. In the other, prescribed procedures are resisted but not replaced.

Together, the role of these two elements of structuration in managers’ attempts to impress their leaders at DeskSales and M-Tel show that the flow of information that Goffman (1959) specifies as an independent check on people’s attempts at impression management can be as open to manipulation as expressions given and given off in interactions. Thus, my research at DeskSales contributes to the dramaturgical theory of action and to its application in organizational settings by showing that Goffman’s model of encounters underestimates and underspecifies the role of independent information in impression management. Goffman specifies independent information as a threat to the image that people strive to present and which audiences are reluctant to draw upon. I show that actors can have enough power over the production of information to give and give off representations that may not only complement, but also supplement and improve, the expressions that they give and give off in interaction. I also show that audiences can use this information to a much greater extent than what Goffman’s model suggests, either to scrutinize the expressions that people give and give off or to reify them to further their own interests. Information is not subordinate to interaction; instead, it is an alternative channel for the dramaturgical dynamics that Goffman found to constitute everyday experience.

**Conclusion**

The dramaturgical model of the production of performance data and its exploitive specification that I induced from my research at DeskSales suggest that managers and leaders use information systems to address a tension between two partially conflicting goals: to provide an accurate representation of performance to improve the company’s chances in the market and to provide an idealized representation to improve managers’ chances in the company. Managers’ attempts to address this tension can be placed in a continuum between two ideal-types of information systems.

One ideal-type—implicit in the functional model of the production of performance data exemplified by research on surveillance in call centers (Ball and Wilson 2000) and by research on the use of performance data to formulate strategy (Vandenbosch and Huff 1997)—defines information systems as transparent windows. The transparent window metaphor invokes transparency and exposure. It emphasizes the appropriation of performance data for monitoring and control based on the shared stake that managers and their leaders have in their company’s performance (Nutt 1987). Managers use information systems to help their leaders see and understand their employees’ work and its outcomes (Daft and Macintosh 1981). However, by doing so, managers risk providing data that jeopardize their attempts to impress their leaders (Jackall 1989).
The other ideal type of information systems—implicit in the exploitive specification of the dramaturgical model of performance data that I induced in my research at DeskSales—defines information systems as store windows. The store window metaphor invokes opacity and staging. It emphasizes the production of performance data to influence and impress leaders based on the individual stake of each manager in the image that their leaders have of them (Kanter 1993). Managers use information systems to produce flattering performance data for impressing their leaders. However, they do so by providing exaggerated records and reports of employees’ work and accomplishments that distort the data their leaders use to plan strategy and to monitor its implementation. The protective specification of the dramaturgical model of the production of performance data is a variation of this ideal type in which performance data are idealized by suppressing, rather than improving, unflattering records of employees’ actions and achievements.

My research at DeskSales emphasizes three distinctions between these two ideal types of information systems. One is the direction of the flow of performance data. When leaders and managers use information systems as a transparent window, they use performance data to monitor compliance downward (Walstrom and Wilson 1997). They use records of work and performance reports to assess whether their subordinates are following procedure and achieving goals, as well as to enforce compliance on those that are not. When leaders and managers use information systems as a store window, they use performance data to show achievement upward. They participate in the production of records of work and performance reports to hide deviations from procedure and failures to reach goals and to exaggerate their accomplishments.

A second difference between the use of information systems as transparent windows and their use as store windows is the requirement for compliance with prescribed procedures and goals. When information systems play the role of transparent windows, compliance requires work. Managers implement information systems to ensure that the procedures and goals they use to monitor employees’ work are the same ones employees use to carry out their everyday tasks, turning the production of performance data into an automatic outcome of work (Sewell 1998). When implemented thus, information systems allow managers to produce good enough performance data to impress their leaders by enforcing the representation of compliance and achievement on their employees at the expense of monitoring and enforcing prescribed procedures and goals.

The third difference between the use of information as transparent windows and their use as store windows is the effect of the production of performance reports on the link between work and its electronic representation. When leaders and managers use information systems as transparent windows, they strengthen the link between work and its representation by producing reports that make performance data more intelligible and accessible to their leaders and thus improve leaders’ ability to monitor and control employees’ work (Langley 1990; Vaara and Mantere 2008). Leaders reproduce this strong link by verifying the records of their employees’ work to ensure and enforce compliance with prescribed goals and procedures.

When leaders and managers use information systems as store windows, they weaken the link between work and its representation by reporting compliance with procedures and goals beyond that supported by their employees’ work. Leaders reproduce this weak link by reifying performance reports and taking them at face value when making sense of their company’s performance and interpreting market dynamics. The production of performance data in individual organizations is a variation of one of these two ideal types.

Using my research at DeskSales to build the dramaturgical model of the production of performance data and outline its exploitive specification imposes limitations on the conclusions of this study, the most important of which is the focus on a self-entry information system. Self-entry information systems such as Siebel create opportunities for people’s participation in the production of performance data that are more limited in information systems that record people’s work automatically. Future research should include a more thorough evaluation of this and other boundary conditions that push organizations from a functional to a dramaturgical specification of the production of performance data.

Despite its limitations and open questions, my research at DeskSales provides enough evidence to emphasize the effect of impression management on the production of performance data. It shows that managers can take advantage of their role in the production performance data to put on an impressive
display of commitment and compliance that idealizes their employees’ everyday work. It shows that leaders can choose to enjoy and further embellish these displays to prove their talent and flaunt their success. When they do so, they fall prey to a dynamic that one sales manager at DeskSales blamed on “people [who] are so worried about looking good, that they forget to be good.”

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About the Author

João Vieira da Cunha is an associate professor at the European University in Lisbon and an affiliate associate professor at the Department of Business Administration (BSS) of Aarhus University. He has a Ph.D. in Management from the Massachusetts Institute of Technology. His research explores how organizations can benefit from disobedience, improvisation and misappropriation of information technology. His work has been published in journals such as the Academy of Management Review, Information and Organizations, Human Relations, and Journal of Management Studies.